



## **New Private Fund Management Firm Seeks to Offer Unique Private Equity and Venture Capital Investment Opportunities to High-Net-Worth Investors**

**APPLETON, WI, September 28, 2021** - Global Alternative Investment Management LLC (“Global Alts”) has announced that it has launched its private fund management business. The Firm seeks to expand fund management services developed under its affiliate, Endowment Wealth Management, Inc. to a broader geographic client base serving high net worth individuals and families, institutional, and non-profit investors.

The current investment team has worked together since 2007 and has raised over \$39 million through eight funds and has allocated over \$50 million to a multitude of alternative assets. The team is currently raising capital (\$7.85 million raised to-date) for its latest Fund, Unicorn Tech Fund II.

Global Alts is being spun out from Endowment Wealth Management, Inc. which has previously launched eight funds. The funds included thematic and opportunistic investments including late-stage technology- focused venture capital (including Unicorn Fund I), financial technology (Fintech), CBD/medical cannabis, medical imaging, and three co-investment funds targeting diversified multichannel retail, defense electronics, and telecom infrastructure respectively.

Robert Riedl, CPA, CFP®, AWMA®, President stated “Our private fund management business was an extension of our alternative investment offering within the context of our 3-D Endowment Investment Philosophy®. However, the majority of the HNW investors in our private funds are attracted to the unique investment opportunities and have less of a need for financial planning and core wealth management service offerings. Thus, it’s a natural evolution of our business to create a stand-alone entity and focus on marketing these unique investment opportunities to a broader HNW client base that are looking for the higher return opportunities that private funds may present. In addition, we also construct customized dedicated funds tailored to HNW families or entities willing to commit \$10 million or more.”

The Firm’s fund research is headed by Prateek Mehrotra, MBA, CFA, CAIA, Chief Investment Officer. Prateek brings a unique global perspective to the Company. Born in India and armed with a degree in engineering, Prateek has earned an MBA, is a CFA charter holder, and is the first Chartered Alternative Investment Analyst in the State of Wisconsin. Prateek has spent his career cultivating relationships with private fund managers, hedge fund

managers, and venture capitalists and utilizes this extensive list of contacts to source unique private and public investment opportunities. Under EWM, Prateek has spearheaded the launch of 9 funds. Mr. Mehrotra commented “At first, it was difficult to get people to commit. We launched our first fund in 2016. All our funds have been opportunistic or thematic in nature. We are looking forward to building upon our experience and tell our story to a broader audience. We truly enjoy sifting through the tremendous number of investment opportunities out there and bring to our investors the unique companies we can locate and add to our funds. We think we have a unique offering and skill set that investors are not able to source on their own or through their traditional investment professional.”

For more information visit [www.GlobalAlts.com](http://www.GlobalAlts.com)

**Contact:**

Robert Riedl, CPA, CFP®, AWMA®  
Managing Member  
Global Alternatives Investment Management LLC  
[Rob@GlobalAlts.com](mailto:Rob@GlobalAlts.com)  
920.785.6010

*Global Alts relies upon the investment adviser registration of Endowment Wealth Management, Inc. based on certain no-action letters issued to the American Bar Association in the past. The activities of Global Alts’ investment advisory activities are subject to the Investment Advisers Act of 1940 and the rules thereunder and is subject to examination by the Securities and Exchange Commission.*

**Global Alternatives Investment Management LLC**  
[www.GlobalAlts.com](http://www.GlobalAlts.com)  
**920.785.6010**