

CorporateLiveWire



# FINANCE AWARDS 2017



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Carlisle Management Company SCA is a full-service, regulated investment management firm that specializes in alternative asset classes and has particular depth in life settlements. Carlisle is based in Luxembourg, where it established its headquarters and fund domicile to take advantage of the country's stringent and well-regulated financial systems in the alternative asset space. The firm emphasizes a comprehensive full-service management approach, and as a result it performs a wide range of tasks over the entire life cycle of its investment vehicles. The Carlisle team is comprised of accomplished senior executives who collectively bring more than six decades of investment experience across multiple industry sectors to the management of the firm's investment products and strategy. Carlisle has experienced exponential growth since its inception, and has garnered a reputation as a pioneer and market leader for investment solutions in the life settlements space.

Carlisle's strategy involves delivering a razor-sharp focus on the asset classes in which it invests, and the application of this focus on life settlements has been a significant factor in its success. After years of assisting institutional clients in the development, structuring, and management of captive investment vehicles, Carlisle's principals realized that the lack of viable investment products in the space afforded them an excellent opportunity to fill the void for this minimally correlated asset class. From this realization was born their flagship investment vehicle, the *Luxembourg Life Fund FCP SIF: Long Term Growth Fund*. In the years since that fund's introduction, the life settlement industry has grown at a phe-

nomenal rate and Carlisle has been well positioned to help its investors take full advantage of these gains through its unwavering attention and expertise across all areas of the industry.

Carlisle puts significant emphasis on designing investment products that meet the demanding needs of its diverse and discerning investor base consisting of institutional investors, financial intermediaries, and high net worth individuals. As an example, in order to provide the increased transparency that many of its investors require the firm offers open-ended funds using mark-to-market valuation systems involving trusted independent service providers at key steps of the process, thus creating that necessary transparency. Carlisle also works to ensure their products are tax-optimized, have strong yet efficient organizational structures, and include all necessary regulatory oversight.

Two of the firm's other key differentiators are its well defined processes for sourcing, underwriting, and valuing life settlements, and its long-standing relationships in the life settlements marketplace. These aspects have allowed Carlisle to excel among its peers in areas such as product acquisition and portfolio management. In order to help improve the long-term prospects of the market, the firm is very active promoting consumer education on life settlements to seniors and insurance providers. Carlisle also continues to innovate in the space by developing new products on both the supply and the investment product sides, while continuing to grow its network of service providers and acquisition sources.



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