

Fund Finance Friday



Fund Fanatics Features Rick Gordon

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Join Scott Aleali, Head of Private Equity Finance at Citizens Bank, and Jeff Maier, Senior Managing Director - Private Equity Finance at Citizens Bank, with special guest Rick Gordon, Wealth Manager at Citizens Private Wealth, for the latest Fund Fanatics episode.

They discuss:

- Must-haves in personal investment strategy for both new and seasoned private equity managers
- Why asset allocation is equally about coaching as it is about numbers; who is responsible for consumer education through the rise of retail in alternative assets
- The Home Depot strategy and why DIY investing isn't always what it seems
- How to choose a wealth platform from big banks to boutiques
- The joys of coaching, leadership and inspiring University of Michigan moments that stand the test of time

Watch [here](#).