



DIGITAL ASSET INVESTMENT FIRM

SARSON FUNDS

CASE STUDY

BACKGROUND

John Sarson worked on Wall Street for more than ten years before starting his own cryptocurrency advisory firm. His interest in crypto emerged in 2016 after he saw bitcoin's strong performance in a trend-following portfolio. John realized that few of the sophisticated financiers he worked with knew anything about it. John saw it as a disruptive asset class, and committed to learning more about it. Shortly after, he launched his firm Sarson Funds. His team segments the market by bringing traditional finance applications to the crypto universe. Each of the six crypto hedge funds his firm currently manages focuses on a specific underlying sector, such as DeFi or stablecoins.

Cryptocurrency and Blockchain Investment Firm has Improved Experience by switching to NAV

OBJECTIVES



Experienced team that specializes in complex crypto strategies and blockchain transactions



Knowledgeable provider with compliance and regulatory support and safekeeping elements



Committed administrator with competitive pricing and high-quality cryptocurrency solutions



Crypto-focused technology with a comprehensive web portal and mobile apps for immediate access to review statements

ACHIEVEMENTS

High quality crypto services

John explained, "We needed an administrator with an understanding of a new paradigm, and how this balance changes over time. NAV provided that for us. Our typical investors are HNW and ultra HNW Baby Boomers in the U.S. who are lifelong learners, and interested in this asset class. They want a white glove experience, but also want someone else to manage asset selection, safekeeping and operational elements, such as taxes. NAV understands our PPMs better than we do, and they keep us compliant. With NAV, there is never even a small opening for a regulator to disrupt our business model."

Best-in-class crypto-focused technology

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Dedicated in-house crypto team

He added, "Our service team is fantastic, but it never feels like we're siloed into one group. It truly feels like we have the entire firm's resources at our disposal. For us, NAV's willingness to grow as our business model changes over time makes them a lifelong partner."

KEY RESULTS



Dedicated team with crypto experience



Crypto platforms with robust capabilities



Competitive pricing and high quality services



Blockchain transactions and crypto solutions