DIVISION 02 · EH CAPITAL GROUP INC.

EH CAPITAL
WEALTH MANAGEMENT

Portfolio Development Division

WEALTH STRATEGY

Custom Portfolios. Legacy Alignment. AI-Powered Growth.

DIVISION OVERVIEW

The Portfolio Development Division is the wealth-building engine of EH Capital Group Inc. It designs and manages bespoke investment portfolio strategies for fiscal sponsors, estate clients, and referral partners — leveraging AI-driven tools to deliver real-time optimization, diversification, and long-term legacy alignment for every client served.

KEY METRICS

750+ Active Referral Clients	**$431 Million** REIT Investment Income Managed
Estate, REIT, Bond, Equity Portfolio Types Offered	**Real-Time Dashboard** AI Optimization Tools

CORE RESPONSIBILITIES

- Design custom, diversified investment portfolio strategies for 750+ referral clients
- Deploy AI-driven portfolio optimization tools for real-time performance tracking
- Manage estate-aligned investment vehicles including REITs and 501(c)(3) bonds
- Provide ongoing portfolio reviews, rebalancing, and performance reporting
- Educate clients on legacy-aligned wealth building and intergenerational transfer
- Coordinate with the Finance Management and Asset Management Divisions on capital deployment

FEATURED PROGRAM

FEATURED PROGRAM

EmpowerEquity Portfolio Initiative

Portfolio Development is the cornerstone of the EmpowerEquity Portfolio Initiative, delivering customized wealth strategies that align client assets with long-term legacy goals. Each portfolio is designed to generate sustainable returns while contributing to community-centered economic development.

STRATEGIC GOALS

- → Scale referral client base to 15,000+ by FY 2026
- → Expand REIT portfolio offerings to include international ESG-aligned vehicles
- → Launch next-generation AI estate modeling platform
- → Develop portfolio education curriculum for community financial literacy programs