

All in the Family

It is no secret that providing customized solutions rather than cookie cutter financial planning and investment options is taking over operations within a significant portion of the wealth advising world.



Building on that approach, the founder and co-managing partner of Axion Financial Group, a Bethany Beach, Del. boutique firm, has taken this customized approach one step further. Antonios "Tony" Kypreos doesn't do anything for his clients that he doesn't do for his family. In most cases, the advice and guidance he gives a select group of affluent individuals and families has its roots in his own family's investment tree.

"Our clients like the fact that we are on the same side of the table – in the same boat as they are," Kypreos said. "We are typically managing our own family capital resources at the same level or perhaps even more than what our clients have. They know they are working with someone who has the exact same day-to-day and year-to-year issues."

Axion was founded in 2010 as a registered investment advisory, fee-only firm. Previously, Kypreos worked in investment management in a large world bank and, as a co-partner along with his father Neoklis "Nick" Kypreos, has been managing his family and extended family assets for 10 years. He hung out his own shingle just as the markets were recovering from the Great Recession.

"Coming off the crisis of '08 and '09, a lot of people were scared. They did not know where to go and what to do," Kypreos added.

It was an opportunity he couldn't let pass. From his own family's ex-

perience since 2005, when alternative investment activity began to dominate their portfolios, Kypreos knew he had winning insight and experience.

Noting that currently, his clients' assets range from one to ten million, he said that most are successful entrepreneurs or well-heeled executives. These assets – while impressive to most of the working world – are not attractive to financial advisors working with ultra-high net worth clients "often deemed more worthy of specialized services or of being part of a purposely-small group, such as is the case at Axion," Kypreos said.

"Our clients like the individualized attention we provide them that typically, at their wealth level, they would not be able to have in working with a larger brokerage firm," Kypreos emphasized.

Axion currently serves 16 families, including his own family and extended families. His goal for his firm's growth is to service a limited selective group of 25 to 30 families.

He strongly believes that the use of alternative investing is here to stay. "Stocks and bonds are only a small sliver of the total investable universe," Kypreos said. "One of

our firm beliefs is to help our family and clients from ever having to go through the experience of a 2008 crisis. Our firm belief is to properly diversify a portfolio that can withstand a 2008 crisis by designing portfolios that have uncorrelated return streams to one another."

Learn more about Axion Financial Group online at www.axionfinancial.com.



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