

Prem Itharat, Founder

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As founder of Pi Capital Management, a New York-based wealth management firm, Prem Itharat caters primarily to young professionals with the goal of helping them reach financial independence through financial advisory and planning services, portfolio/investment management, and financial education. He is a unique breed of financial advisor, serving clients with an in-depth approach that is equal parts analytical finance expert and financial coach and educator. “I compare my approach to that of a gym trainer. Sometimes people need advice; sometimes they need accountability; sometimes a nudge in the right direction,” he explains.

While the firm works with clients across the entire wealth spectrum, Prem believes the needs of these young clients continue to be overlooked by the industry. “Young professionals don’t get the attention they should from financial advisors, yet they can benefit the most from financial advice early on,” he explains. “My goal is to partner with them and get in on the ground floor and help them grow from the beginning; to start saving and investing now so that they can become financially independent. It’s really about setting the stage so that clients are less reliant on traditional sources of income – so that they can pursue their passions!”

After a successful 12-year career in the hedge fund industry, Prem’s desire to contribute more to the improvement of people’s lives drove him to launch a firm that would allow him to do so. His experience, along with an MBA from New York University’s Stern School of Business, allows him to build and manage complex and well hedged portfolios. As a community-minded champion of “overlooked” investors, he founded Pi Capital Management in 2014 so that he could serve people who are often neglected by the financial advisory behemoths. “In my previous job, I felt like I wasn’t making an impact. I started Pi Capital Management specifically to help families with a more personal approach and to cater to up-and-coming working professionals, who are often underserved and yet have the most to gain.”

Pi Capital Management offers a range of financial products and services to help clients generate passive income (income that can grow irrespective of their day to day work) and start growing their money early. As a financial coach, fiduciary, and educator, Prem is dedicated to serving the best interests of his clients—always. In support of this commitment, Prem runs every aspect of the business, serving as the single point of contact for his clients. In addition, the firm offers a financial coaching service, which offers advice from a holistic approach, covering a wide range of topics, from taking out a mortgage to whether to buy or lease a car. Starting at \$99 a month, clients benefit from unlimited access to this interactive plan and from personal responses to specific



questions. “I’m always available to my clients. They can ask me any questions at any time, and I will respond promptly.”

Prem’s commitment to community extends to his personal life. He actively supports many community organizations. Prem is chair of the American Red Cross Young Patrons Program of Metro NY North, an ambassador for the American Cancer Society Making Strides Walk, an executive committee member for Leukemia and Lymphoma Society Light the Night Walk, president of the PTA of his son’s school in Scarsdale, nominating committee member for Scarsdale’s school board, president of the Greenwich Young Professionals Group, treasurer for the Greenwich Rotary, and more.



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