Liquid Strategies™

Building absolute return strategies that diversify traditional investment portfolios.

What We Do:

Founded in 2013 by industry veterans, Liquid Strategies, LLC is an independent advisory firm focused on managing liquid, absolute return portfolios with reduced volatility and low correlations to traditional assets. Our firm delivers these solutions to a wide variety of institutional and individual investors.

Institutions and individual investors are tired of portfolios that fully exposed them to the market's constant gyrations. Increasingly, investors are looking for solutions that deliver a differentiated return experience from that of stocks and bonds without sacrificing liquidity. Whether focused on income generation or diversification from traditional asset classes, Liquid Strategies offers dynamic solutions to help investors achieve their investment goals.

Key Investment Professionals:

Brad Ball – Chief Executive Officer, Co-Portfolio Manager

Brad Ball has more than 30 years of investment industry experience. Brad co-founded Liquid Strategies in 2013 and serves as Managing Member, Chief Executive Officer and Portfolio Manager. He serves on the Liquid Strategies investment team. Prior to Liquid Strategies, Brad was a founding partner and CEO of Perimeter Capital Management and was a member of the management committee of Concourse Capital Management, LLC, an affiliated investment adviser to a long/short equity private fund. Brad also served as Executive Vice President of Trusco Capital Management and served on the firm’s executive committee. Brad has been in the investment industry since 1985 and has served on numerous industry boards and is a frequent conference speaker. Brad is a graduate of Oklahoma State University where he received a degree in Finance.

Shawn Gibson – Managing Partner, Lead Portfolio Manager

Shawn Gibson brings more than 18 years investment experience to his role as Portfolio Manager. Shawn began his options career in 1997 with the Timber Hill Group, one of the world’s largest options market making firms. While at Timber Hill Shawn was as an options trader on the floor of the Pacific Exchange and was later promoted to join a small team in Greenwich, CT that was responsible for overseeing the firm’s multi-billion dollar options portfolio. He subsequently served as Head of Options Strategy and as Director of Alternative Investments at BB&T, where he worked with advisors and their clients to develop options-based hedging and yield enhancing strategies. Shawn is an active member of his community and was voted as one of the Top 40 leaders under 40 while living in Richmond after being nominated by his peers due to his professional accomplishments and community involvement. Shawn earned his B.S. in Commerce from the University of Virginia (1994).

Adam Stuart, CFA – Partner, Co-Portfolio Manager

Adam Stewart has more than 17 years of investment industry experience and co-founded Liquid Strategies in 2013. Adam is co-portfolio manager of the Theta strategy and serves on the Liquid Strategies investment team, which is responsible for setting portfolio allocations based on the risk profile of the markets. Adam began his career at Franklin Templeton in 1997 and later served as Head of Equity Trading at Trusco Capital Management along with managing equity trading operations. Most recently, Adam was a founding partner and Director of Trading for Perimeter Capital Management. Adam received his Chartered Financial Analyst (CFA) designation in 2001 and earned his B.A. (1997) from Auburn University.