

# **Bond Case Briefs**

*Municipal Finance Law Since 1971*

---

## **Chris Paganelli: How to Assess OZ Funds (Podcast Episode #22)**

What are some due diligence best practices that every investor should undertake before investing in a Qualified Opportunity Fund? Chris Paganelli is a San Francisco Bay Area-based financial advisor at wealth management firm Stifel. He advises high net worth clients on tax strategy, wealth preservation, and portfolio management — with a recent focus on qualified

[Continue reading.](#)

April 17, 2019

Copyright © 2024 Bond Case Briefs | [bondcasebriefs.com](https://bondcasebriefs.com)