

s, we are committed to
which keeps our focus
it should be – on you.”

– William Mason, III, Founder and CEO



Client Service Is Our Top Priority

Meet Our Team



William Mason, III

Founder, Chief Executive Officer

Reston, VA

THE
MASON
COMPANIES



Scott George

President and Chief Investment Officer

Reston, VA

THE
MASON
COMPANIES



Chris Schreiner

Chief Operating Officer

Reston, VA

THE
MASON
COMPANIES



Judie Birchfield

Chief Compliance Officer & In-house Counsel

Chapel Hill, NC





THE
MASON
COMPANIES



Will Thorpe

Chief Marketing and Development Officer – Institutional
Reston, VA

00

000+

0.0B+

00

News

Mason Celebrates 20 Years as an OCIO

December 6, 2018 /

FOR IMMEDIATE RELEASE Mason Celebrates 20 Years as an Outsourced Chief Investment Officer Mason Investment Advisory Services, Inc., a Reston, VA based investment consulting firm serves over 80 institutional clients across the country. Reston, VA, December 6, 2018: Mason Investment Advisory Services, Inc., a Reston, VA based registered investment advisory firm, is proud to celebrate [...]

Read [more](#) »

<https://masoncompanies.com/2018/12/06/mason-celebrates-20-years-as-an-ocio/>

Barron's Lists Mason as a Top 20 Institutional Consultant

May 23, 2018 /

FOR IMMEDIATE RELEASE Mason Investment Advisory Services, Inc., CIO, Scott George listed in the top 20 of Barron's annual Top Institutional Consultants survey: "Where the big money goes for advice." Reston, VA, May 23, 2018: Mason Investment Advisory Services, Inc., a Reston, VA based registered investment

Research

Strategic Asset Allocation and Opportunistic Rebalancing for Foundations and Nonprofits

A goal of foundations in general is to achieve a level of return that is adequate to further their missions at an acceptable risk level; in other words, they do not wish to take on more risk than is necessary to accomplish the goal. During bear markets, foundations are typically concerned about rapid and severe reductions in asset values. Alternatively, during bull markets foundations may take on more risk than they need to achieve their long-term goals. Over the long term, however, we believe that it is important to have a disciplined strategy and not overreact to short-term trends.

Revisiting Your Investment and Distribution Goals

Benjamin Franklin once said that nothing in this world is certain, except death and taxes. Endowments suspend these certainties as they are generally exempt from taxes and live on indefinitely.

Endowment spending policies specify the balancing between appropriately funding today's beneficiaries and protecting endowment assets for tomorrow's beneficiaries. Since fiduciaries maintain a substantial portfolio to fund the needs of both future and current generations, it is important to establish a portfolio allocation and payout policy that properly balances these competing demands.

[Click here to learn more about our Research](#)

advisory firm is pleased to announce their

list on |

[more >](#)

[\[https://masoncompanies.com/2018/05/23/barrons-lists-mason-as-a-top-20-institutional-investment-consultant/\]](https://masoncompanies.com/2018/05/23/barrons-lists-mason-as-a-top-20-institutional-investment-consultant/)

Mason Launches New Website

April 26, 2018 /

FOR IMMEDIATE RELEASE Website redesigned to better serve clients, reflect the firm's rapid growth, detail their expanded services, integrate their new branding and to highlight Mason's staff
Reston, VA, April 26, 2018: Mason Investment Advisory Services, Inc., a Reston, VA based registered investment advisory firm, is pleased to announce the launch of their new website. [...]

[Read more >](#)

[\[https://masoncompanies.com/2018/04/26/mason-launches-new-website/\]](https://masoncompanies.com/2018/04/26/mason-launches-new-website/)
