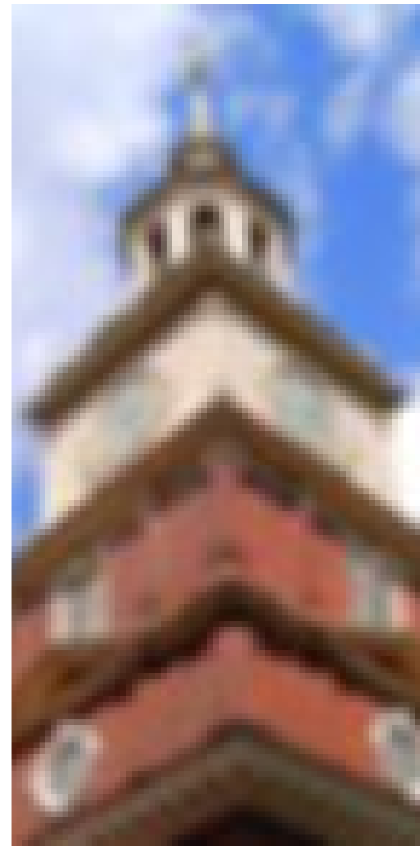
As fiduciaries, our top priority is the advancement of each client's unique objectives through unbiased analysis and careful execution of deliberate investment strategies.



We specialize in providing investment advisory services and acting as Chief Investment Officer for a select group of compatible clients. We cover all asset classes and categories, seeking the optimal mix of exposures and managers unique to each client's needs.

Located in the greater Philadelphia area, Independence Asset Advisors (IAA) has been serving institutional and high net worth clients since 2010. We are an SEC-registered, privately owned and managed firm with assets under management exceeding $940 million.

Through a combination of sophisticated investment management expertise, a conflict-free model under which our clients' interests are uncompromised, and meticulous attention to service and communication, IAA serves as a partner to a select base of institutional and family office clients. We are selective in our approach, cost-efficient, focused on exceptional client service.

ABOUT US

We act as the Chief Investment Officer for the clients we serve. Our interests are solely aligned with our clients' as a long term partner and collaborator. Success is measured by meeting each client's objectives now and in the future.

INDEPENDENT

CLIENT FOCUSED

We partner with our clients to build refined investment portfolios in order to achieve an optimized balance of risk and return. We offer highly tailored investment strategies that match our clients' financial needs and goals.

Our experience comes from managing investments through many market cycles and from observing the markets from different perspectives. Our views are supported by analytics and comprehensive research across all asset classes.

EXPERIENCED

DILIGENT

A team focused on a select group of clients provides the highest level of service to each organization. Risk management and due diligence mitigate surprises while rebalancing assures adherence to each client's unique allocation.

Independence Asset Advisors

Asset Allocation

Strategic asset allocation is the key driver of portfolio returns and an important tool for meeting return objectives and managing risk.

Risk Management

A good investment is one that will perform well when your investment thesis is correct. A great investment is one that protects investors when the future delivers the unexpected.

Manager Selection

Our focus is on finding the investment strategies best suited to our clients' needs. Successful long-term relationships require a thoughtful alignment of interests between manager and client.

Rebalancing

Reversion to the mean is one of the most powerful forces in investing. Rebalancing is used to manage risk and can improve overall returns.

Cost Efficiency

Fees and trading costs can substantially degrade returns over time. Fees should be commensurate with value added.

OUR PROCESS

Goals and Objectives

Each client is unique. A comprehensive understanding of expectations, time horizon, risk tolerances and restrictions is essential for producing an investment policy statement or redefining existing guidelines.

Unique Allocation

Based on needs and risk tolerances, there is an efficient allocation for each client. Flexibility within a portfolio's asset allocation allows for tactical shifting of assets based on valuation and market conditions.

Portfolio Construction

Our clients use over 70 different managers across all asset classes. We have no predetermined selection of managers and constantly evaluate new strategies and firms. Each strategy is viewed in the context of the client's total portfolio and their investment objectives.

Rebalancing

We work to keep a portfolio near its target allocation. Periods of market mispricings and timely rebalancings are opportunities to improve an overall portfolio. Comprehensive manager oversight helps to mitigate surprises.

Portfolio Monitoring

Financial markets change continuously and rapidly. Because of this, we continually search for the best strategies and managers, always performing ongoing due diligence on existing ones. We design customized reporting and communications that our clients find understandable and relevant.

OUR TEAM

SCOTT RENNINGER
PRESIDENT AND
CHIEF INVESTMENT OFFICER

Scott founded Independence Asset Advisors in 2010 to provide investment advisory and outsourced CIO services to a select group of compatible clients. He oversees and directs all portfolio construction and client investment strategy.

KATIE KEARNS
VICE PRESIDENT
AND MANAGING DIRECTOR

Katie is responsible for managing client service and reporting functions and directing firm operations. Katie is IAA's client liaison and works with each of them to understand their respective investment needs and execute tactical components of their individual investment strategies.

THOMAS GRUGAN
DIRECTOR, INVESTMENT
MANAGEMENT

Tom manages research and analysis, including market research and commentary, investment analysis, and manager due diligence. Tom aids in optimizing investment portfolios through market research, efficiency assessment, performance analysis, and fee negotiation.

REBECCA SAUKAITIS
SENIOR ASSOCIATE, CLIENT
SERVICE AND REPORTING

Rebecca is responsible for the production of client reporting, account and performance reconciliation, and maintaining the firm's client investment reporting platform. Rebecca also assists with investment account management and conducts internal firm administration.

MORE INFORMATION

CONTACT
Independence
Asset Advisors

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