

Rethinking Asset Management™

We are an independent investment management firm serving foundations and endowments, family trusts, retirement plans, and high net worth investors.



Who We Are

Blue Edge Capital, LLC (BEC) is an independently-owned investment management firm based in Richmond, Va. serving forward-thinking investors. Our investment approach is unique, focused, and disciplined and our personal assets are invested alongside our clients. Our investment approach has been developed to meet increasingly stringent fiduciary standards, and our solution provides transparency, global diversification, daily liquidity, lower investment costs, and institutional-quality performance reporting. As a guiding commitment to our clients, we act with integrity and conduct ourselves in a highly ethical and responsible manner, and, in every instance, place our clients' interests ahead of our own. As a firm, we are committed to fostering an environment that promotes independent thought, critical analysis and innovation for the benefit of our clients.

[Learn More](#)

Who We Serve



Our unique investment approach allows BEC to fit the needs to both taxable and tax-exempt investors, including high net worth individuals, endowments and foundations, corporations, pensions & retirement plans, and trusts & charitable trusts. As a small firm, we have direct relationships with each of our clients and take pride in our collaborative approach. BEC has no affiliated businesses, and it is our intention to continue to grow the business as we have since our inception, one relationship at a time.

Individuals & Families



Endowments & Foundations



INVESTMENT

Corporations, Pensions & Retirement Plans

Trusts & Charitable Trusts

Investment Strategy

BEC serves as an Outsourced Chief Investment Officer (“OCIO”), and in this role, we serve as a fiduciary for all of our clients. All client assets are managed on a fully discretionary basis. Unlike many other OCIOs who manage commingled investment pools, all BEC client accounts are managed on a separately managed account (SMA) basis. All of our portfolios are diversified across asset classes, geographies, market capitalizations, industry sectors, and style, and our exposure to each primary asset class is governed by strict policy ranges. BEC utilizes exchange traded funds (ETFs) rather than active managers or traditional mutual funds to achieve our asset allocation.

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LOCATE US

Blue Edge Capital, LLC

6641 West Broad Street Suite 405 Richmond, VA 23230

GET IN TOUCH

804-673-7401

804-477-8705

info@blueedgecap.com