

Birch Run
INVESTMENTS

Birch Run Investments

Specializing in Fixed Income Investment Strategies tailored to unique client objectives including liquidity, risk tolerance and socially responsible investment goals.

 LEARN MORE

(<https://birchrainvestments.com/contact/>)

Fixed Income Management for Institutional and High Net Worth Investors



Core Fixed Income

A value-oriented and opportunistic strategy that invests across the entire yield



Intermediate Fixed Income



Tax Exempt Total Return

invests across the entire yield curve in a diverse mix of investment-grade fixed income securities.

A value-oriented and opportunistic strategy that invests in a diverse mix of investment-grade fixed income securities with maturities of less than ten years.

Actively managed strategy that seeks to enhance tax free income with price appreciation by investing opportunistically across the entire yield curve.



Short Term Fixed Income

Conservative strategy for investors with a short term investment horizon with an emphasis on a high level of current income and reduced interest rate risk.



Short Term Fixed Income Plus

An opportunistic corporate bond strategy that invests along the front end of the yield curve with a focus on price appreciation and current income.

Tactical allocations to high yield bonds and Government securities are eligible components of this strategy as a means to further enhance portfolio results.

EXPERTISE

We have the experience and resources to manage accounts of all types including Taft-Hartley, Non-Profit, Corporate, Foundation or High Net Worth portfolios.

OPPORTUNISTIC APPROACH TO INVESTING

Our boutique size allows us to be more nimble and opportunistic than many of our peers. This creates meaningful opportunities for our clients.



TRANSPARENCY

We are committed to working collaboratively with our clients to meet their unique objectives and provide ongoing communication to reaffirm the appropriate investment strategy.

DISCLOSURES

Privacy Policy (<https://birchruninvestments.com/privacy-policy/>)

ADV Part 2 (<https://birchruninvestments.com/wp-content/uploads/2018/07/2018-0314-Birch-Run-Part2-AB.pdf>)

CONTACT

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