



Started

# Professional Wealth Management

Trust, Confidence and Experience

Financial Planning | Investment Strategy | Wealth Management

BirdRock Asset Management is an independent financial advisory firm providing custom-tailored investment services for our clients. Our mission is to help our clients achieve long-term financial security. Because our relationships are built on trust and transparency, we have gained national recognition as a top independent wealth management firm.

## Wealth Management Accolades

Informa-PSN **Money Manager of the Decade** as of 12/31/2014

Multiple recipient Informa PSN **“Top Gun” Money Manager**

**5-Star Morningstar Rating** for the 10 year period ending 12/31/2015

Seven Time **Texas Monthly Five Star Wealth Manager**

# Built On Trust

BirdRock Asset Management started building trust with our clients from day one. Through the ups and downs of annual market volatility, we stand tall with all of our clients, now more than ever. Because BirdRock is a **100% fee-only advisor**, we are never compensated by commissions and we don't sell financial products. At BirdRock Asset Management, our advisors will help you craft a custom-tailored wealth management plan that fits your unique financial goals. We're on your side and we're here to help. **Give us a call today.**

## Professional Investment Advisors

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We incorporate a holistic approach to financial planning, combined with vigorous market research and a continuous review of our asset allocations. Our team of experts provide our clients with professional financial guidance and wealth management advice. In fact, we invest right alongside our clients, so you always know that we've got your back and we're in your corner. Founded in 2006, our company is 100% employee-owned and is headquartered in Austin, Texas.

*BirdRock Asset Management is compliant with the Global Investment Performance Standards (GIPS®). All performance is verified by an independent GIPS verification firm.*

[See Disclosures](#)

[Investment Team](#)

[Privacy Policy](#)



Need Help? Call Us at:  
**512-236-0071**

Create your plan and get  
on track to hit your goals.

Get Started



## Meet Our Team of Experienced Professionals

Steve Levy serves as President of Birdrock Asset Management. He brings twenty years of industry experience. He has managed BirdRock's Five-Star ranked Morningstar Small Cap Value Fund since its inception in

2004. Steve has also been named an Informa-PSN “Top Gun Money Manager of the Decade” as of 12/31/2014. He began his career as a Reinsurance Analyst with the JI Companies in Austin, Texas before joining Janus Capital in 1999. From 2001-2006, he served on the Investment Committee of Slaughter & Associates before opening BirdRock Asset Management in 2006. Steve has an undergraduate degree in Political Science and Spanish with an emphasis in International Relations from San Diego University and he studied emerging markets, economics and U.S. Foreign Policy at the Universidad Colegio Anahuac in Guadalajara, Mexico in 1986-87. Steve also serves on the Board of Directors for the International Education Fund in Austin, Texas. \*see disclosure

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**Steve Levy**

President and Portfolio Manager



**Christina Borger**

Managing Director and Assistant Portfolio Manager



**Heather Justman**

CPA - Chief Financial Officer



**Aaron Soderberg**

Director of Institutional Sales & Marketing



**Stephanie Boeke**  
Investment Advisor & Client Relations



**Jack Tamez**  
Research Analyst



**Gustavo Artaza**  
Founding Partner

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## Get in Touch

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