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A PRINCIPLED APPROACH TO WEALTH MANAGEMENT

Principium Investments is an integrated wealth management and financial planning firm headquartered in Boulder, Colorado.

We offer personalized financial strategies that align our clients' financial goals with their values and principles.

How We Work



FEE ONLY

As an SEC Registered Investment Advisor, we uphold the fiduciary standard to act in our clients' best interests. Our independent, unbiased financial advice is secured by the way we earn money. Our only source of revenue comes from fees we charge our clients as a small percentage of invested assets.

We do not receive commissions from



NO MINIMUMS

We welcome clients with modest savings, as well as those with millions in the market. While most wealth management firms require new clients to have a minimum investment amount of at least \$1,000,000, we believe in providing high quality financial advice to people at various stages of wealth creation. We pride ourselves on helping young



PERSONALIZED APPROACH

We get to know you, understand your goals, and show you the path to achieve them. Our investment strategies are tailored to each client's financial objectives, time horizon, risk tolerance, tax situation and cash flow needs. We work with clients to build portfolios that match your values. From considering women's leadership, to environmental conservation,

recommending products, which could compromise our objectivity. Our financial incentives are fully aligned with our clients.

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professionals, working parents and retiring individuals achieve their financial goals. We welcome company retirement plans of every size.

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and social responsibility, we help our clients grow wealth, and provide positive impact.

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What We Do



ASSET MANAGEMENT

We provide portfolio management services to individuals and organizations, delivering optimized market-based financial and societal returns using mutual funds and ETFs. Our proprietary investment framework is designed to meet the demands of any market environment and has been used to manage resilient portfolios for more than two decades.



FINANCIAL PLANNING

Led by a Certified Financial Planner, our team helps clients plan for all stages of life using advanced financial projection software. We have extensive experience navigating our clients through the unexpected, including divorce and illness.

Through Principium Charitable, a 501c3, we provide philanthropic and impact investing advisory services.



ESTATE PLANNING

We provide a wide range of services to support the planning and implementation of multi-generational wealth strategies including estate planning, tax efficient wealth transfer planning, estate and trust administration and charitable giving. We work with our clients and their attorneys to craft thoughtful estate plans informed by our wealth transfer financial models.

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Who We Are



ACTIVE MONEY MANAGERS

We proactively adjust portfolio asset allocations to capitalize on market upturns while protecting assets during market downturns. Our dynamic investment approach is the opposite of "set it and forget it". Our portfolio manager has been a strong steward of client assets for 30 years through the market boom of the 1990s, the market bust of 2000, the post-911 downturn, and the great recession of 2007-2009.

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BUSINESS LEADERS

Our team has founded, run or invested in multiple organizations, including start-ups, non-profits, corporate divisions, foundations, economic development agencies, and social enterprises. We have lived through the trials and travails entrepreneurs face, and empathize with the financial pressure leadership brings. We are continually seeking to increase the positive impact of our own business at Principium Investments.

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COMMUNITY PARTNERS

With a collective community service history spanning more than 70 years, we have lived into the motto of "give before you get" by dedicating our time toward causes such as climate change, human rights, economic development, youth empowerment and animal welfare. We commit a portion of profits from Principium Investments toward supporting entrepreneurs working to solve some of the world's greatest challenges.

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