OUR 2018 NET RETURN WAS +7.29%* (https://capitalcounsel.com/fact-sheets/fact-sheet)
WHILE THE S&P 500 TOTAL RETURN WAS -4.38%. (https://capitalcounsel.com/fact-sheets/fact-sheet)

WE BELIEVE

OUTSTANDING PERFORMANCE

is the result of

METICULOUS PREPARATION
+
DISCIPLINED EXECUTION

*The disclosures on the linked Fact Sheet are an integral part of this statement. (https://capitalcounsel.com/fact-sheets/fact-sheet)

INVEST WITH US (/contact-us)

Capital Counsel, founded in 1999, is an independent investment management firm based in New York City.

We manage concentrated portfolios of large-cap and mid-cap companies based in the U.S., or with large U.S. operations. **We choose these stocks from ideas generated through the investment team's in-depth, bottom-up research efforts.** Our disciplined investment process requires us to focus on how management runs their company.

Our clients include high-net-worth individuals and their families, foundations, and endowments. The source of the net worth for many of our clients is ownership in successful businesses. Some are former executives of companies held in our clients' portfolios. **They have become clients because they understand and respect our investment process.**

LEARN MORE (/firm)

We build our business one client at a time *through word-of-mouth and personal recommendations. We operate as an independent b and invest alongside our clients.*

MISSION

Capital Counsel's mission is to help clients achieve their financial goals by investing wisely to preserve and grow their wealth.

LEARN MORE (/firm#mission)

MANAGEMENT MATTERS MOST

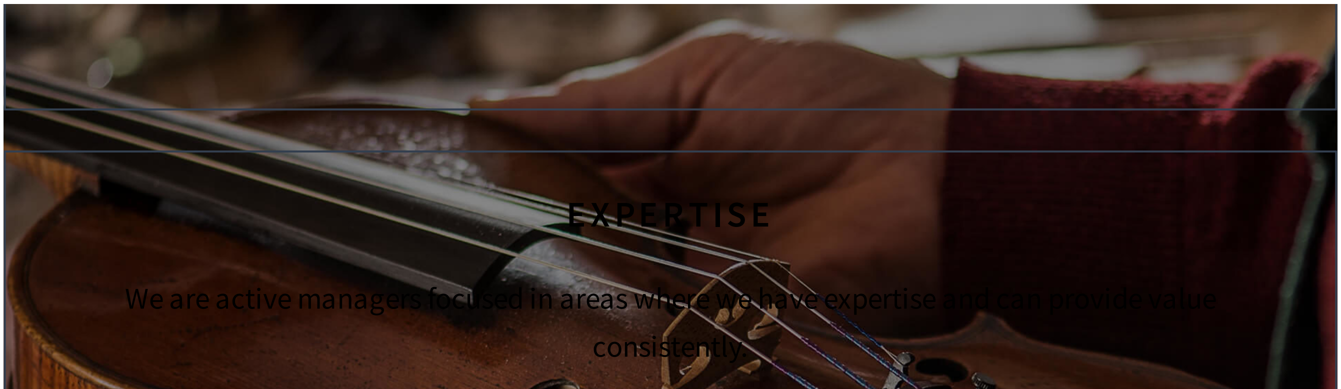
LEARN MORE (/services#management-matters-most)

CORE VALUES

We are responsible stewards of our clients' money and adhere to these 6 core values.

INDEPENDENCE

We are an independently-owned investment management and advisory firm established in 1999. We develop our own unconstrained views and insights, and work diligently to deliver objective, bespoke solutions to clients.



EXPERTISE

We are active managers focused in areas where we have expertise and can provide value consistently.

PARTNERSHIP

We know that working together results in better outcomes within our organization and with our clients. We ask our clients what they want their money to do for them and invest accordingly.

PRACTICAL THINKING

Overvaluation and undervaluation are characteristics of financial markets. Our practical advice helps clients navigate markets by finding growing businesses run by competent, honest managers who are wary of borrowing money to grow faster because they have managed businesses through difficult times. We make sure our clients understand what they own and why they own it.

INTEGRITY

We are responsible, ethical, and competent professionals who work hard to earn our clients' trust and confidence. We always keep their financial interests first and foremost.

ALIGNMENT

We strive to do what is right - not what is easy - and succeed when our clients succeed. We invest our assets alongside those of our clients.