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Purpose

Make a positive difference for our clients, our team and our communities.



Process

Diverse voices and experiences add to a unique team-based approach.



Philosophy

Investment style that strives to exploit market inefficiencies to achieve client goals.



Insights

Macro outlook for more informed institutional investing.

Consistently growing by cultivating strategic partnerships.

91 93 95 97 99 01 03 05 07 09 10 11 12 13 14 15 16 17 18 19

Assets Under Management (USD Millions as of March 31, 2019)

FAST FACTS

0

Years

Investment Team's average years of work experience.

0

Percent

Employee Owned. Ownership aligns business and client interests.

0

Years

Average client tenure. Clients stay with us and grow with us.

