ATHENA
Capital Advisors

"As a trusted advisor, we pride ourselves on delivering insightful and unbiased investment and wealth solutions, attuned to the markets and the specific needs of our clients."

Lisette Cooper, CFA, PhD, Managing Partner, Chief Investment Officer

OUR TEAM

An advocate for clients and their families

Lisette Cooper, PhD
Managing Partner, Chief Investment Officer

Leonard Lewin, JD
Managing Partner, Vice Chairman

William F. McCalpin
Managing Partner, Impact Investments

Anne Marie Towle, JD
Managing Partner, Private Client Services and Wealth Strategies

Bethanie Bullock
Managing Director, Investment Accounting

Todd Burchett, CFA, FRM, CAIA
Managing Director, Portfolio Management

Douglas M. Cohen
Managing Director, Portfolio Management

Kate Huntington
Managing Director, Research

Alex Paul, CFA
Managing Director, Portfolio Management

Erick Rawlings
Managing Director, Research

Tyler Rodday
Managing Director, Private Client Services

John H. Tyler
Managing Director, Foundations and Endowments

Amy Spector
Chief Financial Officer

Emily Guadagnoli
Vice President, Director of Marketing & Communications

Katherine Burke, CFA
Vice President, Portfolio Management

APPROACH

Providing a customized, comprehensive and caring customer experience

CUSTOMIZED:
Through understanding each client's needs, objectives and risk tolerance, we create individually tailored portfolios.

COMPREHENSIVE:
Our open architecture yields an expansive universe of investment options across all global asset classes.

CARING:
Exceptional service is characterized by diligent portfolio management, insightful communication, and our desire to anticipate client needs.

OUR INVESTMENT APPROACH

Strategic Asset Allocation

Tactical Asset Allocation

Instrument Selection

The customized portfolio incorporates three distinct sources of returns

Diversification and compounding returns anchor our long-term investment philosophy and underpin our approach to strategic asset allocation. Tactical asset allocations capitalize on short-term market inefficiencies and help protect portfolios against downside market risk. And as a manager of managers, instrument selection is informed by quantitative and qualitative analysis and enabled through our access to top managers across asset categories. ...More

"As a firm, we participate in over 500 manager meetings each year, across all of the global asset classes, to build a knowledge base and network that allows us to bring to clients the forward-thinking ideas and strategies tailored to their needs."

KATE HUNTINGTON, MANAGING DIRECTOR, CO-HEAD OF RESEARCH

OUR INSIGHTS

Sound judgment backed by in-depth analysis

WHITE PAPERS

Investing in Gender Equality

A practitioner's perspective on gender lens investing and the construction of gender inclusive investment strategies

NEWS

Kate Huntington Evaluates Gender-Focused Funds

LEARN MORE ABOUT OUR NEWS

"As a privately held independent firm, our only obligation is to serve our clients. Our unrivaled network of investment managers across asset classes affords us the privilege to deliver customized portfolios aligned to each client's investment objectives, risk tolerance, and liquidity needs."

TYLER RODDAY, MANAGING DIRECTOR, PRIVATE CLIENT SERVICES