

Investure is a recognized leader in the endowment and foundation investment management industry having pioneered the full-service investment office model.



Investure, LLC is the full-service investment office for a limited number of not-for-profit organizations. Investure, LLC was founded in 2003 based on the premise that small and mid-sized not-for-profit institutions often find that building a high-quality investment staff is neither economical nor preferable. We believe that those institutions should have the same dedicated investment expertise that many larger not-for-profits enjoy.



Our partners: Hance West, Puja Seam, Jon Hill, Bruce Miller, Chad Morgan, Chas Cocke, and Andriy Shapowal

approach. We manage each client's entire investment portfolio across all asset classes.

What We Stand For

Investure is a values-driven firm. From the outset, our intent was to create a company whose foundation is excellence and stewardship. These principles drive all that we do. Our people share a passion for investing and our culture embraces constructive debate, innovation, humility, and a drive for continuous improvement. The Guiding Principles described below serve as the touchstone for all business decisions we make.

Service

Our clients come first. We are proud of our association with them and our image is intrinsically tied to them in a variety of ways. Most of our

Humility

We will be humble enough to know we can and will undoubtedly be wrong, but we seek to learn from our mistakes. We will continually

Teamwork

We value a collaborative approach among clients, managers, service providers and our team. There is no room for personal agendas.

that ethic in mind. What our clients pay us comes out of their mission. We will continue to grow only when we perceive that it does not diminish our service to existing clients.

all as equals. No task is beneath anyone in the firm.

work. We lead by example and operate with the Golden Rule in mind. We endeavor to build partnerships with our clients, managers, service providers and teammates, such that they become our greatest advocates.

Stewardship

We will put our clients' long-term interests above our short-term business goals. We will endeavor to invest in a way that helps our clients take advantage of their natural time horizon advantage and to serve them with that in mind. Our investment style is intended to make it across valleys, no matter how deep or wide, in order to

Excellence

We should deliver excellent long-term investment performance, set industry standards for excellent service, be excellent employers and be excellent co-workers. We intend to work hard and work smart. Our pursuit requires a continuous self-evaluation of our successes and our failures. Our world is ever changing and we

Integrity

We strive to exemplify the highest ethical standards in both our work and personal lives. We believe this requires transparency in our actions as well as honest and straightforward discourse with our clients, team members and business partners. We seek to work only with those who share our values. We cherish our good reputation.

years. We will act as stewards of our business and community and will have the duty to pass on a better world than the one we inherited.

goal to be the best not the biggest.

People

Our team is our most valuable asset. We recognize that our success depends on surrounding ourselves with good, hard-working people that employ excellent judgment. We want a culture that attracts and retains excellent people. This means that we treat each other with respect, help each other when needed, and are respectful of each other's personal needs and challenges. We

diversity of opinion is a
key ingredient to
investment success.
We want to have our
team be passionate
about the work they
do. As such, we need
to create an
atmosphere that
nurtures their success
and invests in their
development.

*Investure also manages assets for one taxable family relationship, private equity assets for former clients and assets of friends and family.

Investure

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