



## F I R M

- Founded in 1997
- Headquarters in Los Angeles, California
- Provides investment management and advisory services to wealthy individuals, families, trusts and foundations with \$20 million or more in investable assets
- Oversees over \$5 billion in assets, including private foundation relationships
- Services over 250 clients located across the United States
- Employs over 40 individuals including financial analysts, investment advisors, research professionals, portfolio managers, fixed income and equity traders, and administrative support
- Offers a diverse mix of proprietary and sub-advisory “best-in-class” investment strategies within open architecture platform
- Prepared to maintain our asset management capabilities in the event of a disaster
- Actively engaged as leaders in the community