

## Our Vision

---

We strive for excellence in our investment process and in the relationships we have with our clients.

## Our Mission

---

### Our People

We hire and develop people who are:

- client-focused
- accountable yet team-oriented
- expert while respectful of others
- ethical at all times

### Our Philosophy

1. Risk must be managed
2. A constant asset mix is best
3. Enhanced passive approach to bonds
4. A consistent quantitative approach to equities

### Our Promise

We promise to stick with our investment philosophy – always.

## Our Values

---

### Life Balance

We create a culture that promotes a balance between our work and our personal lives.

### Process Driven

We develop and maintain excellent processes for Investments, Client Service, and Administration.

### Entrepreneurial

Our people act like owners because they share in our success.

### Community Minded

We give back to our communities through volunteerism and a focused corporate giving program.