

2024 Year in Review

KEY INDICATORS

47 YEARS

Operating as an SEC
Registered Investment
Advisor since 1977

\$5.5 bln

Assets under
Advisement

10%

5-Year Annual Growth
Rate of Assets Under
Advisement

Serving Clients in



States

1,200

Clients

98%

Client Retention
Rate

39%

of Client Relationships
Surpass **10** Years

10

Board of Managers
Members

46

Associates

44%

Increase in Associate
Headcount since 2019