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# Hammond Associates Firm Overview

# Established Firm

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**Hammond Associates Brings Extensive Experience, Depth of Understanding, and Stability to All of Our Relationships**

- Firm
  - Founded in 1985
  - National Practice
  - 31 Employee-Shareholders
  - Independent Fiduciary
  - Proprietary Research
  - Consult to Over \$28.0 Billion in Total Assets
  
- Staff
  - 81 Staff Members
  - 56 Investment Professionals
  - 37 Advanced Degrees (includes 2 Ph.D.s)
  - 22 CFAs; 1 CAIA; 2 CPAs
  
- Clientele
  - 54 Higher Education Institutions
  - 14 Pension Plans
  - 41 Foundations
  - 12 Health Care Institutions
  - 12 Private Wealth Clients



# Hammond Associates Philosophy and Approach

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- Fiduciaries
- 22 year history of serving clients like you
- Proactive investment adviser to clients
  - Global breadth of investment knowledge
  - Outstanding sourcing and access to managers
  - Educational orientation towards Staff and Trustees
    - Objective recommendations and decisions
    - Proprietary Research
    - Practice Specialties and Discipline Expertise



# Our Clientele

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## HIGHER EDUCATION (\$9.7bn)

### Independent

Baker College  
**Baylor University**  
Bucknell University  
Central Methodist University  
Christian Brothers College High School  
Colgate University  
Cornell College  
**Dallas Theological Seminary**  
DePauw University  
Grand View College  
Harding University  
Illinois Wesleyan University  
John Brown University  
Lebanese American University  
Lenoir-Rhyne College  
Luther College  
Maryville College  
Morningside College  
Mount Mercy College  
Ranken Technical College  
Regent University  
Rochester Institute of Technology  
Rollins College  
Simmons College  
Simpson College  
Saint Louis University  
St. Louis University High School  
St. Olaf College  
**Texas Lutheran University**  
The Abbey of Saint Mary and Saint  
Louis  
**Trinity Christian Academy**  
University of Rochester  
Wartburg College  
Westminster College  
William Jewell College  
Wittenberg University

### Public

Ball State University Foundation  
East Tennessee State University Fdn.  
Eastern Illinois University  
Eastern Illinois University Foundation  
Emporia State University Foundation  
Florida Atlantic University Foundation  
Michigan State University Foundation  
Michigan Tech Fund  
Missouri State University Foundation  
Oklahoma St. Regents for Higher Education  
Old Dominion University Foundation  
**Texas State University – San Marcos  
Development Foundation**  
**Texas Tech University**  
University of New Mexico Foundation  
**University of North Texas Foundation**  
University of Oregon Foundation  
Washington State University Foundation  
Western Illinois University Foundation

## PRIVATE WEALTH (\$4.0bn)

Scottsdale, AZ	Leawood, KS
Paradise Valley, AZ	Weston, MA
Miami, FL	Portland, ME
Vero Beach, FL	Baltimore, MD
Lakeland, FL	Columbia, MO
Boca Grande, FL	St. Louis, MO
Coral Gables, FL	Patton, MO
St. Petersburg, FL	Liberty, MO
Marion, IA	Warrenton, MO
Spirit Lake, IA	Bedford, NY
Cedar Rapids, IA	<b>Dallas, TX</b>
	Hunts Point, WA

*Note: This list includes all institutional clients, except for individuals, and those requesting confidentiality. It is not known whether the listed clients approve or disapprove of Hammond Associates, or the advisory services provided. Inclusion of a client on the list does not imply that the client endorses or recommends Hammond Associates as an investment advisor. Performance based criteria were not used in determining which clients to include on the list.*



# Our Clientele

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## PENSIONS (\$5.5bn)

### Corporate

Archdiocese of Dubuque<sup>1</sup>  
Catholic Foundation for E. So. Dakota<sup>1</sup>  
Credit Union Benefits Services  
CUNA Mutual Group  
**Dallas Theological Seminary<sup>1</sup>**  
Graybar Electric Company  
Les Schwab Tires  
St. Louis Symphony Orchestra  
Sisters of the Good Shepherd<sup>1</sup>  
Snap-on Incorporated  
**SW Texas Methodist Pension Board**

### Public

City of Joplin Police & Fire  
Prince William County Police & Fire

### Taft-Hartley

Local 202 – Sheet Metal Workers

## HEALTH CARE (\$2.0bn)

Avera Health System  
Children's Hospital of the Kings Daughter  
Covenant Health  
Covenant HealthCare  
Iowa Eye Institute  
Mercy Medical Center  
Mercy Medical Center Foundation  
PCI - Surgical Specialists  
St. Anthony's Medical Center Foundation  
Wellmont Foundation  
Wellmont Health System  
Wesley Retirement Services, Inc.

## FOUNDATIONS (\$6.3bn)

### Private

Committee to Protect Journalists  
Deaconess Foundation  
Flight Attendants Medical Research Institute  
Iowa West Foundation  
Mott Foundation  
Murchison Foundation  
Powell Foundation  
St. Louis Symphony Orchestra  
**St. Luke's Lutheran Health Ministries, Inc.**  
Samuel Roberts Noble Foundation  
Servant Foundation<sup>1</sup>  
The Lennox Foundation  
The Saemann Foundation  
Watts Foundation  
William Penn Foundation

### Community

Albuquerque Community Foundation  
Community Foundation of Broward  
Community Foundation of Greater Flint  
Dade Community Foundation/DadeFund  
Greater Cedar Rapids Community Foundation  
Greater Des Moines Community Foundation  
Norfolk Foundation  
Madison County Community Foundation  
Rochester Area Community Foundation  
Santa Barbara Foundation  
The Community Foundation, Inc.(Jacksonville)

### Public

Archdiocese of Dubuque  
Boys Hope Girls Hope Foundation  
Catholic Foundation for Eastern South Dakota  
**Dallas Seminary Foundation**  
Foundation for the Flint Cultural Center  
Ganna Walska Lotusland  
Holston United Methodist Home for Children  
Lutheran Social Services  
Missouri United Methodist Foundation  
Roman Catholic Diocese of Paterson  
St. Mary's Home  
St. Peter's Cemetery Trust  
Sequoyah Council, Boy Scouts of America  
Sisters of the Good Shepherd  
Tanager Place Endowment Foundation  
The Oklahoma United Methodist Foundation

<sup>1</sup> Multiple assignments

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