
Hammond Associates Firm Overview

Established Firm

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

- 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

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	Dallas, TX
	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

PENSIONS (\$5.5bn)

Corporate

Archdiocese of Dubuque¹
Catholic Foundation for E. So. Dakota¹
Credit Union Benefits Services
CUNA Mutual Group
Dallas Theological Seminary¹
Graybar Electric Company
Les Schwab Tires
St. Louis Symphony Orchestra
Sisters of the Good Shepherd¹
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 Foundation¹
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

¹ Multiple assignments

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