

a **50+** year history of engaging clients
and best-in-class partners

1967

Founded as an institutional money management firm in Denver, Colorado. The firm manages funds for national endowments and pensions with a focus on large-cap US stocks. A nationally recognized performance track record is established.

1976

Firm joins United Asset Management (UAM) as the first member organization. UAM grows to 50 plus institutional investment management firms with north of \$250 billion in assets.

1989

Chartered with the state of Colorado as the first independent personal trust company in the Rocky Mountain region.

1993

Principals of firm acquire UAM's interest in the organization, making the firm wholly employee-owned and client-centered.

1992

SEI INVESTMENTS
Firm becomes first outsourced trust bank client nationally. Founding member of SEI Advisory Council.

2008

NORTHERN TRUST
Correspondent Trust organization, adding Northern's fiduciary expertise to firm's capabilities. Developed a core US stock management partnership for firm clients.

1998

DIMENSIONAL (DFA)
Firm approved as initial Colorado trust organization to work with Dimensional Fund Advisors (DFA) in offering index- and factor-based investment options.

2016

Firm establishes a Colorado Springs trust and wealth management office, expanding its presence in the region.

2017

FIDELITY
In partnership with Fidelity developed a modern fiduciary and custody platform for trust organizations. Founding member of Fidelity Bank and Trust Advisory Board.

2015

ENVESTNET
Integrated firm's trust capabilities with Envestnet's leading portfolio, trading and investment platform, resulting in a comprehensive wealth management solution.

2024

PRIVATE INVESTMENTS
Developed an alternative asset program employing private equity and credit.

2020

BLACKROCK
Partnered with Blackrock in development and rollout of custom portfolio asset allocation services. Founding member of Blackrock Alternative Investment Council.