ASPIRIANT

Dedicated to Helping Clients Successfully Coordinate and Manage Their Financial Lives

Our Firm

Aspiriant is committed to being the leading, and permanently independent, wealth management firm, dedicated to meeting our clients' needs across generations.

Aspiriant provides personal wealth strategies, investment advice and management, and family office services to a select number of sophisticated and wealthy individuals and their families throughout the nation. Our professionals help our clients to identify, consider, and comprehensively manage the information and risks that are relevant to their unique set of circumstances and objectives. We are dedicated to helping our clients successfully coordinate and manage the moving parts of their financial lives.

As a Registered Investment Advisor, Aspiriant has provided demonstrably excellent investment returns through innovative thinking and disciplined decision-making. We treat investment management as a science and an art, using insights based on rigorous research and analysis, and a thorough understanding of each client's objectives.

Our Unique Features

Aspiriant is uniquely and truly independent. We sell no financial products and are paid only by our clients; this allows our organization to make conflict-free recommendations that are consistent with the objectives of the families we serve. In addition, we are 100% employee owned, and have organized our firm's ownership to attract and retain top talent. Our structure and governance allow us to remain permanently independent so that we can continue to execute on our value proposition for our clients, and for our clients' heirs.

Our Strengths

Aspiriant was born out of the passion of the firm's principals to provide deeply integrated and comprehensive wealth management services to our high net worth family clients. We long ago recognized that affluent families have special service needs that were not being properly addressed in the marketplace. The individual goals and needs of our clients ultimately guide us in delivering our key client service value proposition.

AT A GLANCE

Total Assets Under Advisement: $4 Billion

Locations: San Francisco and Los Angeles

Contact: Cammie Doder, Director of Business Development, cdoder@aspiriant.com or 415.371.7888

Our Value Proposition

Objective advice that is not influenced by any conflict of interest; a comprehensive service offering; the expertise necessary to identify, prioritize and optimize the client's objectives; a world-class investment platform; and integrated solutions that are tailored and coordinated to manage the needs of a family over multiple generations.

Our Typical Client

Aspiriant specializes in working with individuals and families who have already attained a high degree of financial success. Our client families look to us to help them:

- Optimize what their wealth can help them achieve
- Build and manage portfolios that are sophisticated, efficient and appropriate for them
- Transfer wealth and family values to younger generations
- Benefit society through personalized, tax-efficient philanthropy
- Organize and manage their financial affairs
- Achieve clarity, confidence and peace of mind
- ....and a lot more...