

## FIRM AT A GLANCE

We make investment consulting personal. Where others may check the box and dispense generic advice, we deliver high-touch, tailored service. And where others may offer a bewildering array of services, we focus on one thing: **helping clients prosper**. Guided by our ethical and fiduciary responsibility, we put clients' interests first. With clients and offices across the nation, we are positioned to provide personalized service, wherever you may be. We strive to bring humanity to prosperity.

### Our culture is defined by five core values:

1. **Aligned Interests.** We strive to place your interests above our own.
2. **Intellectual capital.** We offer practical solutions to complex challenges.
3. **Integrity.** We do the right thing for the right reason.
4. **Excellence.** We seek to exceed expectations.
5. **Stewardship.** We are dedicated to safeguard the capital and trust of our clients.



### 178 Associates

40% Consultants  
 20% Research  
 40% Operations, Compliance and Client Service  
 15%+ Associates w Ownership



### Approx. \$227 Billion

Assets Under Advisement



### Business Lines

Defined Contribution  
 Defined Benefit  
 Private Clients  
 Endowments  
 Foundations  
 Financial Institutions

### Firm Recognition & Expertise



**Ranked #1** - Top 50 Institutional Consulting Teams  
*BARRON'S*<sup>1</sup>

Top 25 Worldwide Consultants  
*PENSIONS & INVESTMENTS*<sup>1</sup>

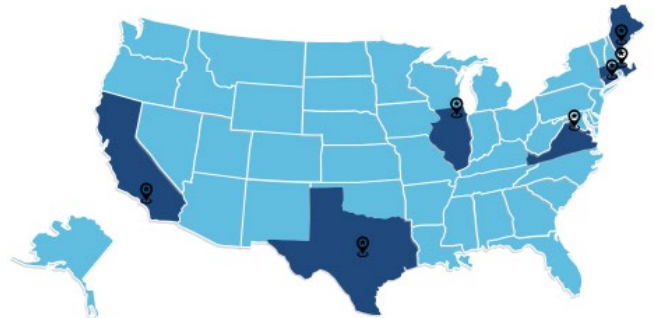


Top 15 RIA Financial Advisor  
*FINANCIAL ADVISOR*<sup>1</sup>

Authored **five books** on investment management

### Seven Locations

Chicago, Hartford, Austin, Boston, Los Angeles, Portland, ME and Washington, DC



**Clients in 47 states**

*Fiducient Advisors was formerly known as DiMeo Schneider & Associates, L.L.C.*

*P&I's Consultant Ranking is a proprietary survey produced by Pension & Investment. Results are based on 80 questionnaire responses sent to 213 consultants determined by P&I that self-reported institutional assets under advisement as of June 30, 2020. Consultants with multiple subsidiaries are asked to provide information on a consolidated basis. There is no fee associated with participating in the ranking. The ranking is not indicative of DiMeo Schneider's future performance.*

*FA's RIA Ranking is an independent listing produced by Financial Advisor magazine based on discretionary and non-discretionary assets under management as reported in the Form ADV of the 715 eligible firms. DiMeo Schneider's ranking took into consideration the combined capabilities of the firm and its subsidiary, Fiduciary Investment Advisors, LLC. To be eligible, firms must provide financial planning and related services to individual clients, be independently registered investment advisors, file an ADV statement with the SEC, and have at least \$500 million in assets under management as of December 31, 2019 based their ADV filing with the SEC. There is no fee associated with participating in the ranking. The 2020 ranking is not indicative of DiMeo Schneider's future performance.*

*Barron's Institutional Consulting Teams ranking is based on quantitative and qualitative factors including team's assets, revenue, size and character of the team itself. Barron's invites firms that, in their opinion, are competitive given size and sophistication. There is no fee associated with participating in the ranking. DiMeo Schneider's ranking took into consideration the combined capabilities of the firm and its subsidiary, Fiduciary Investment Advisors, LLC.*

*P&I's 2020 Best Places to Work in Money Management ranking is a proprietary survey produced by Pension & Investment in partnership with Best Companies Group. 94 companies were recognized in 2020 and results are based on evaluating each nominated company's workplace policies, practices, philosophy, systems and demographics, as well as an employee survey to measure employee experience. DiMeo Schneider's rankings are representative of the firm and its subsidiary, Fiduciary Investment Advisors, LLC. There is no fee associated with participating in the ranking.*