FIDUCIENT Advisors

Fiducient Advisors At A Glance

Helping Clients Prosper

Placing client interests first

Delivering personalized service

Driving decisions and results

Who We Serve

401(k) and **403(b)** Plans

Defined Benefit and **Cash Balance** Plans

Endowments and **Foundations**

Individuals and **Families**

Financial Institutions

Why Choose Fiducient Advisors?

ZERO proprietary investments or commissions

~14 years average associate industry experience

>16% of associates are owners

A Look Forward... Beyond Investments

Advancing **diversity**, equity and inclusion

Mission-aligned investing

Supporting **charities** and communities

Job creation and internship programs

Who We Are

28+ years servicing clients

200+ Associates

7 Locations

1,000+ clients

80 Research & Analytics Professionals

2,000+ Manager Due Diligence Touches (calls, on-site meetings etc.) annually

Our Clients

290+ Endowments & Foundations

550+ Defined Contribution Plans

170+ Defined Benefit Plans

400+ Private Wealth Clients

35+ Family Offices

55+ Financial Institutions

"Large Enough to Serve, Small Enough to Care"

For more information, contact us at 800.260.5445

Information and assets under advisement as of June 30, 2023 are approximate. Headcount and ownership as of March 31, 2022, percentages are approximate. There may be overlap in responsibilities of some research professionals. Manager interactions counted from April 2022 – April 20223. On December 31, 2020, Fiduciary Investment Advisors LLC merged with Fiducient Advisors LLC (formerly known as DiMeo Schneider & Associates, L.L.C.). Information prior to 2020 is representative of Fiducient Advisors, which started conducting business in 1995.

www.FiducientAdvisors.com