



**FOR IMMEDIATE RELEASE**

**MONTICELLO ASSOCIATES CELEBRATES 20 YEARS OF WORLD-CLASS  
ASSET MANAGEMENT CONSULTING**

**DENVER – OCTOBER 29, 2012** – Monticello Associates, Inc., one of the country’s leading asset management consultants, is celebrating its 20<sup>th</sup> Anniversary.

Founded by B. Grady Durham in 1992, Monticello -- named after the home of Thomas Jefferson -- has grown into one of the country’s premier asset management consulting firms. With a singular focus on endowment and foundation clients and high-net-worth families, the company today works with some of the most prominent museums, hospitals, schools, and families in the United States.

The firm maintains its headquarters on Denver’s historic Larimer Street and an additional office in Cleveland, Ohio.

“I started Monticello with one client and a mission to provide superior investment consulting services,” says Mr. Durham, who still leads the firm’s day-to-day efforts. “I am proud of the great firm Monticello has become, but I am even more proud of the long-term relationships we’ve built with our clients over the past twenty years.”

Monticello, which has remained independent from its inception, today provides a variety of asset management consulting services to more than 150 client relationships. With no ties to any brokerage firm, investment management firm, or any other provider of financial services, the firm’s core services include investment policy development, investment manager recommendations, asset allocation guidance, and performance measurement.

With 43 employees, the firm maintains a high level of personal service and unbiased perspective found nowhere else in the industry.

“In a marketplace where advice tends to be commoditized, we work to bring real value in the form of deep knowledge about investment managers and all essential asset classes,”

says Mr. Durham. “We believe it’s a forward-thinking approach that sets Monticello apart from its competitors.”

**About Monticello Associates**

Monticello Associates is an independent, fee-only asset management consulting firm headquartered on Denver’s historic Larimer Street with an additional office in Cleveland. Founded in 1992, the firm assists endowments, foundations, and family offices in the areas of asset allocation, investment policy development, investment manager search and selection, and performance measurement. As of December 31, 2011, the firm provided investment-consulting services to 154 client relationships representing approximately \$53 billion of assets under advisement. For more information, visit [www.monticelloassociates.com](http://www.monticelloassociates.com).

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