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MONTICELLO ASSOCIATES CELEBRATES 25 YEARS

DENVER – August 16, 2017 – Monticello Associates, Inc., one of the country’s leading asset management consultants, celebrated the firm’s 25th anniversary last month.

Founded in 1992 by B. Grady Durham, Monticello Associates began with a mission to provide superior investment consulting services to foundations, endowments and family offices. The firm was given its name as a reflection of Mr. Durham’s admiration of Thomas Jefferson and his famous Virginia estate, as well as their shared values of self-reliance, intelligence, honesty, and hard work. Combining these values with Mr. Durham’s belief that the firm must be positioned to adjust to the ever-changing markets, Monticello Associates has been providing world-class asset management consulting services for 25 years.

The firm remains 100% employee owned with 175 clients, approximately \$82 billion in assets under advisement, and expanded locations in Cleveland and Boston.

Monticello has captured success with a singular focus on endowment and foundation clients and high-net-worth families, and works with some of the most prominent museums, hospitals, schools, and families in the United States. The Company credits its success to an unbiased perspective, sound judgment, and core values that have endured for more than two decades through a wide range of market environments.

“I am immensely proud of the firm that Monticello has become over the past 25 years,” said B. Grady Durham, President and Founder of Monticello Associates. “We owe our success not only to the firm’s independence and adherence to core values, but the unparalleled group of clients that we are so fortunate to serve.”

About Monticello Associates

Monticello Associates is an independent, fee-only asset management consulting firm based on historical Larimer Street in Denver with additional offices in Cleveland and Boston. 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, 2016, the firm provided investment consulting services to 175 client relationships representing approximately \$82 billion of assets under advisement.

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