

Agility / PWP

Firm Fact Sheet January 2020

Long-term vision.
Daily oversight.

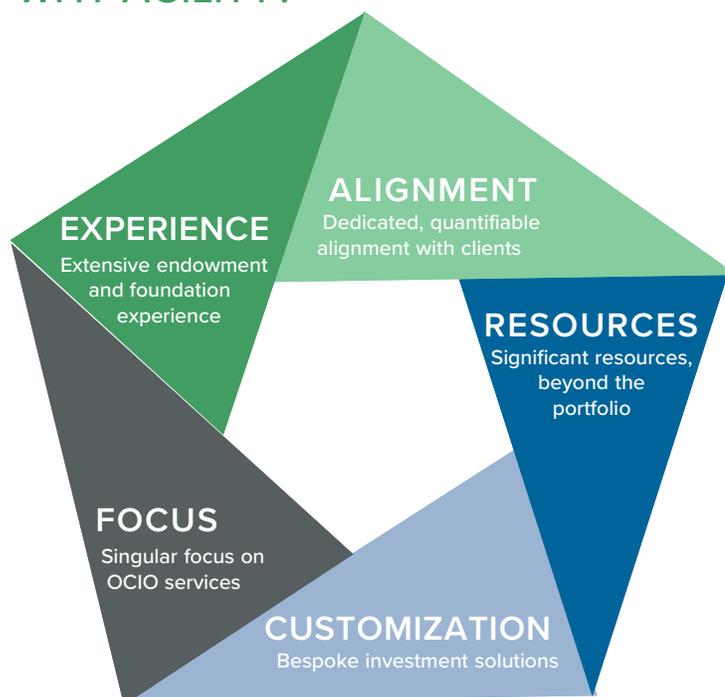
/ OVERVIEW

Agility has provided Outsourced CIO services to a select group of endowments, foundations, and family offices since inception in 2007. Led by five partners with over 120 years of collective investment experience, our team works closely with a limited number of clients to develop and execute customized investment solutions. By providing the dedicated resources, expertise, and daily oversight that prudent management of long-term assets demands, we strive to make each client feel as if it has its own in-house investment team.

/ PHILOSOPHY

We founded Agility on a few simple ideas that remain the core tenets of our investment philosophy today: collaborative decision-making; multi-manager, multi-asset class portfolio construction; customized asset allocation; and rigorous due diligence on each investment. These ideas form the basis of our approach to everything we do – from manager selection and portfolio construction to operational due diligence and risk management.

/ WHY AGILITY?



/ CAPABILITIES

- › **Multi-asset class portfolio solutions that leverage top managers globally.**
- › **Customized solutions tailored to each client's unique situation.**
- › **Specialty mandates in areas such as impact and sustainable investing.**

/ AGILITY BY THE NUMBERS

AS OF JANUARY 1, 2020

Number of clients	35
Total AUM ¹	\$10.1 B
Average years of partner experience	25
Employees	48
CFA charterholders	12
Investment team professionals	23
Support team professionals	25

1. Estimated AUM for the Agility platform as of 1/1/20.

/ AGILITY PARTNERS / PREVIOUS EXPERIENCE

CHRIS BITTMAN
Partner, CEO & CIO

- CIO, University of Colorado Foundation
- President & CEO, Jurika & Voyles
- Western Regional Manager for Merrill Lynch's Business Financial Services Group

TREY THOMPSON, CFA
Partner, President

- Managing Director, University of Texas Investment Management Company
- Associate, Prudential Capital Group
- Goldman Sachs

KENT MUCKEL, CFA
Partner, Deputy CIO

- CIO, Baylor University
- Senior Portfolio Manager, University of Colorado Foundation
- Vice President and Senior Director, Qwest Asset Management Company

AMITA SCHULTES, PH.D
Partner, Client Portfolio Manager

- Partner, Managing Director, Colonial Consulting
- Ibbotson Associates
- Salomon Smith Barney

DARREN MYERS, CFA
Partner, Director of Research

- Senior Research Analyst, Tejas Securities Group
- Senior Analyst, University of Texas Investment Management Company
- Perry Capital

ACCOLADES / Agility has been awarded "Outsourced CIO of the Year" four times based on innovative investment strategies, impressive overall performance and client service, and effective risk management.

Institutional Investor

HEDGE FUND
INDUSTRY AWARDS

Outsourced CIO
of the Year 2017

Institutional Investor

HEDGE FUND
INDUSTRY AWARDS

Outsourced CIO
of the Year 2015

Institutional Investor

HEDGE FUND
INDUSTRY AWARDS

Outsourced CIO
of the Year 2014

Foundation & Endowment Intelligence

HEDGE FUND
INDUSTRY AWARDS

Outsourced CIO
of the Year 2013

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