

# Agility

Firm Fact Sheet // 2Q 2020

Long-term vision.  
Daily oversight.

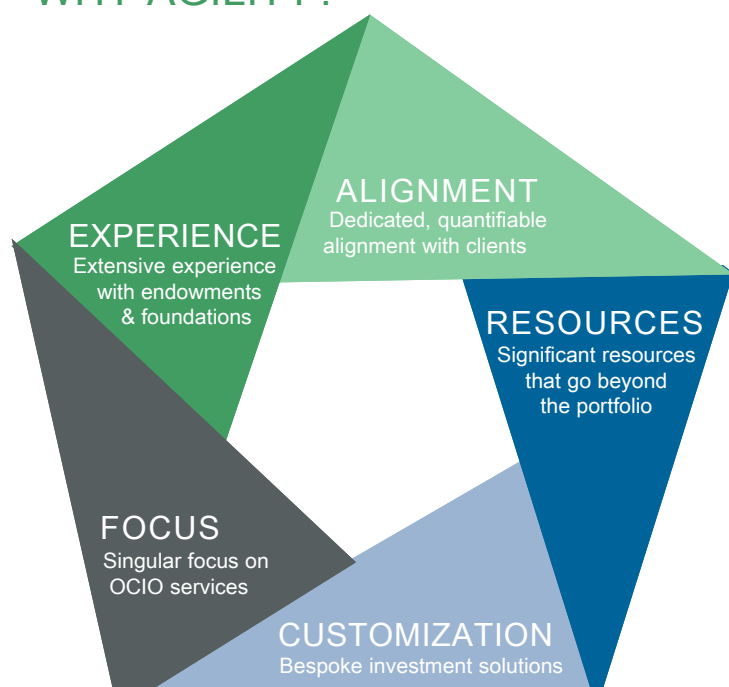
## / OVERVIEW

Agility has provided Outsourced CIO services to a select group of endowments, foundations, and family offices since inception in 2007. Led by six partners with over 140 years of collective 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 ESG, impact and sustainable investing.

## / AGILITY BY THE NUMBERS

AS OF JUNE 30, 2020

Number of clients	38
Total AUM <sup>1</sup>	\$10.3B
Avg. years of partner experience	24
Employees	46
CFA charterholders <sup>2</sup>	12
Investment team professionals	22
Support team professionals	24

1. Estimated AUM for the Agility platform as of 6-30-20.

2. CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute.

## / AGILITY PARTNERS / PREVIOUS EXPERIENCE

**CHRIS BITTMAN**  
Partner, CEO & CIO

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

**TREY THOMPSON, CFA**  
Partner, President

- Managing Director, University of Texas Investment Management Company
- 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

**FRANCES NI**  
Partner, Chief Financial Officer

- Chief Financial Officer, ReachCapital
- Head of Finance & Assistant Controller, FrontPoint Partners, LLC
- PricewaterhouseCoopers

## ACCOLADES /

Awarded "Outsourced CIO of the Year" four times based on demonstrated excellence in absolute return investing and long-term overall performance.

*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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