

Agility

Firm Fact Sheet // 2Q 2021

Long-term vision.
Daily oversight.

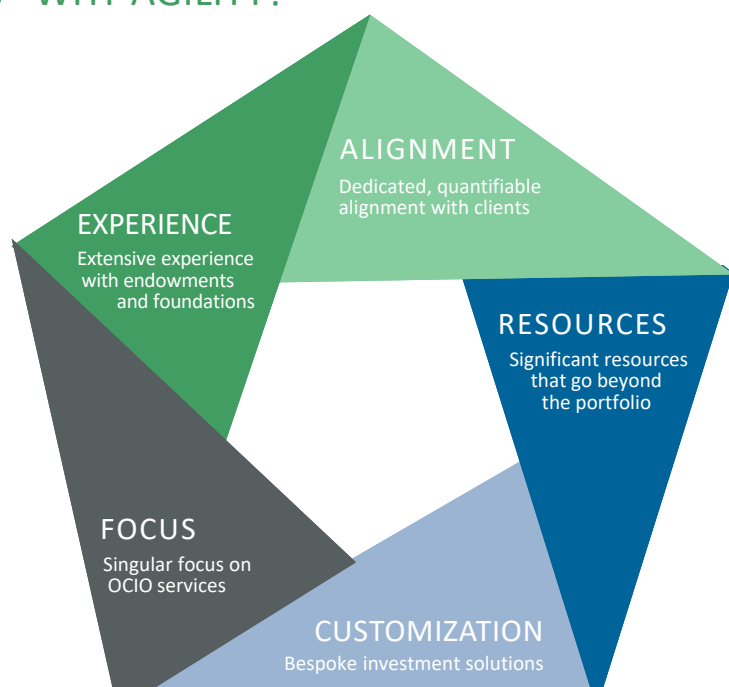
/ OVERVIEW

Agility has provided Outsourced CIO services to a select group of endowments, foundations, family offices, and corporations 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 a global group of top managers.
- › 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, 2021

Number of clients	40
Total AUM	\$13.8B
Avg. years of partner experience	25
Employees	52
CFA charterholders ¹	14
Investment team professionals	26
Support team professionals	26

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/ AGILITY PARTNERS

CHRIS BITTMAN
Partner, CEO & CIO

TREY THOMPSON, CFA
Partner, President

KENT MUCKEL, CFA
Partner, Deputy CIO

AMITA SCHULTES, PH.D
Partner, Client Portfolio Manager

DARREN MYERS, CFA
Partner, Director of Research

FRANCES NI
Partner, Chief Financial Officer

/ PREVIOUS EXPERIENCE

- CIO, University of Colorado Foundation
- President & CEO, Jurika & Voyles
- Western Regional Manager, Merrill Lynch Business Financial Services Group
- Managing Director, University of Texas Investment Management Company
- Prudential Capital Group
- Goldman Sachs
- CIO, Baylor University
- Senior Portfolio Manager, University of Colorado Foundation
- Vice President and Senior Director, Qwest Asset Management Company
- Partner, Managing Director, Colonial Consulting
- Ibbotson Associates
- Salomon Smith Barney
- Senior Research Analyst, Tejas Securities Group
- Senior Analyst, University of Texas Investment Management Company
- Perry Capital
- 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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