

# Agility

Firm Fact Sheet // 2Q 2022

Long-term vision.  
Daily oversight.

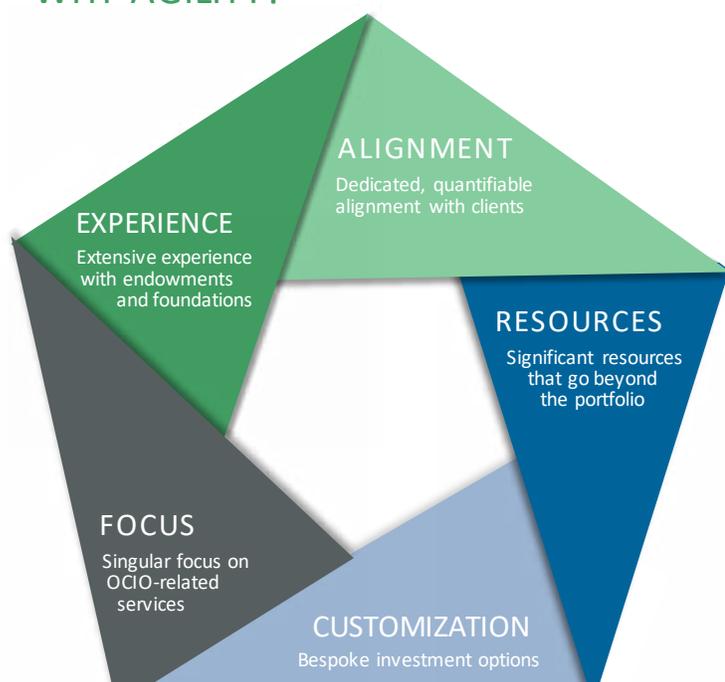
## / OVERVIEW

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 150 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 network of managers.
- › Customized solutions tailored to each client's unique situation.
- › Specialty mandates such as environmental, social, and governance (ESG) and mission-aligned investing.

## / AGILITY BY THE NUMBERS

AS OF JUNE 30, 2022

Number of clients	41
Total AUM <sup>1</sup>	\$13.8B
Avg. years of partner experience	26
Employees	56
CFA charterholders <sup>2</sup>	14
Investment team professionals	26
Support team professionals	30

1. AUM for the Agility platform as of 6/30/2022

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

## / 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



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Investments discussed herein may be speculative and involve a high degree of risk; could result in loss; and may have volatile performance. There is no assurance objectives will be met. Alternative investments, including commodities, can be speculative, involve substantial risk of loss, and may not be suitable for all investors.

Pension Bridge Institutional Asset Management Award for "OCIO of the Year": Following a public call for applications, a panel of judges for the Pension Bridge Institutional Asset Management Awards (comprised of seven individuals for 2021) selected award category winners based on each entrant's responses to evaluation category questions. Evaluation criteria includes quantitative

information regarding number and asset value of new institutional clients added over the past year, percentage business growth for the same period, as well as qualitative information, including how advice over the last year impacted client returns, excellence in customer servicing, and ESG strategies and implementation and innovations implemented in the previous year. Each category was assigned a designated percentage of the total score. The winners for each category were announced at an annual awards ceremony. For additional information on the OCIO of the Year Award, please visit: <https://www.iamanagementawards.com/home>. Institutional Investor Magazine and Foundation & Endowment Intelligence Award for "Outsourced CIO of the Year": Following a public call for nominations, the editorial staff of Institutional Investor magazine selected award nominees based on how strongly candidates, both those put forward via the call for nominations, and those independently identified by the editorial staff, meet the criteria for their respective categories. Once the nominees were publicly announced, the magazine group then conducted a wide survey of U.S. institutional investors and invited them to vote for the manager nominees. Hedge fund managers were also invited to vote for the investor nominees. Institutional Investor's editorial staff analyzed the results of the voting to determine the winners, who were announced at the annual awards dinner and ceremony. Foundation & Endowment Intelligence, published by Institutional Investor covers non-profit investment opportunities and the non-profit sector. Following 2019, the Outsourced CIO of the Year is no longer an award category provided by Institutional Investor. Agility has no affiliation with Pension Bridge, Institutional Investor, Foundation & Endowment Intelligence, nor any persons who select the award. Agility did not pay any fees to be considered for any of the awards referenced herein. **The Awards are not indicative of Agility's future performance, nor are they representative of any one client's experience with Agility.**