FIDUCIENT Advisors

Fiducient Advisors At A Glance

Helping Clients Prosper

Placing client interests first

Delivering personalized service

Driving decisions and results

Over $250 Billion
Assets Under Advisement

Why Choose Fiducient Advisors?

98% client satisfaction rating

ZERO proprietary investments or commissions

14 years average associate industry experience

>18% of associates are owners

Who We Serve

- 401(k) and 403(b) Plans
- Defined Benefit and Cash Balance Plans
- Endowments and Foundations
- Individuals and Families
- Financial Institutions

Who We Are

26+ years servicing clients

189 Associates

7 Locations

1,000+ clients across **48** states

70+ Research & Analytics Professionals

2,400+ Meetings with Investment Managers annually

"Large Enough to Serve, Small Enough to Care"

800.392.9998
www.FiducientAdvisors.com

See disclosures at end of document.

Firm Recognition

Pensions&Investments
Top 25 Worldwide
Consultants in 2021

BARRON'S
RANKED #1
Top 50 Institutional
Consulting Teams in 2020

FA FINANCIAL ADVISOR MAGAZINE
Top 15 RIA
Financial Advisor in 2021

Pensions&Investments
Best Places to Work
in Money Management 2020

Our Clients

275+ Endowments & Foundations
500+ Defined Contribution Plans
140+ Defined Benefit Plans
400+ Private Wealth Clients
35+ Family Offices
30+ Financial Institutions

A Look Forward... Beyond Investments

Advancing **diversity**, equity and inclusion
Mission-aligned investing
Supporting **charities** and communities
Job creation and internship programs

For more information, contact us at 800.392.9998

Information and assets under advisement as of June 30, 221. Headcount and ownership as of January 1, 2022, percentages are approximate. There may be overlap in responsibilities of some research professionals. Manager interactions counted from January 2021-December 2021.
P&I's 2020 Best Places to Work in Money Management ranking is a proprietary survey produced by Pension & Investment in partnership with Best Companies Group. 94 companies were recognized in 2020 and results are based on evaluating each nominated company's workplace policies, practices, philosophy, systems and demographics, as well as an employee survey to measure employee experience. Fiducient Advisors' rankings are representative of the firm and its subsidiary, Fiduciary Investment Advisors, LLC. There is no fee associated with participating in the ranking.
P&I's Consultant Ranking is a proprietary survey produced by Pension & Investment. Results are based on 71 questionnaire responses sent to 213 consultants determined by P&I that self-reported institutional assets under advisement as of June 30, 2021. Consultants with multiple subsidiaries are asked to provide information on a consolidated basis. There is no fee associated with participating in the ranking. The ranking is not indicative of Fiducient Advisors' future performance.
Barron's Institutional Consulting Teams ranking is based on quantitative and qualitative factors including team's assets, revenue, size and character of the team itself. Barron's invites firms that, in their opinion, are competitive given size and sophistication. There is no fee associated with participating in the ranking. Fiducient Advisors' ranking took into consideration the combined capabilities of the firm and its subsidiary, Fiduciary Investment Advisors, LLC.
FA's RIA Ranking is an independent listing produced by Financial Advisor magazine based on discretionary and non-discretionary assets under management as reported in the Form ADV of the 715 eligible firms. Fiducient Advisors' ranking took into consideration the combined capabilities of the firm and its subsidiary, Fiduciary Investment Advisors, LLC. To be eligible, firms must provide financial planning and related services to individual clients, be independently registered investment advisors, file an ADV statement with the SEC, and have at least $500 million in assets under management as of December 31, 2019 based their ADV filing with the SEC. There is no fee associated with participating in the ranking. The 2020 ranking is not indicative of Fiducient Advisors' future performance.
Client Retention - Not included in lost and gained client calculations are terminations due to merger/acquisitions, closed portfolios or bankruptcies. A client is defined by an organization and may contain more than one portfolio. All are Institutional clients. Institutional client retention rates over the last five years are averaged annually from 1/1/2017 to 12/31/2021. 2021 values are as of December 31, 2021 unless otherwise noted. All values are approximate. It is not known whether the clients identified approve or disapprove of the advisory services we provide.
On December 31, 2020, Fiduciary Investment Advisors LLC merged with Fiducient Advisors LLC (formerly known as DiMeo Schneider & Associates, L.L.C.). Information prior to 2020 is representative of Fiducient Advisors, which started conducting business in 1995.

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