



# HIGHLAND

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*Transforming portfolios. Advancing missions.*

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**HIGHLAND ASSOCIATES** is a leading  
institutional investment firm that provides  
objective, research-driven investment  
counsel to not-for-profit healthcare entities  
and mission-based organizations.

Highland Associates was founded in 1987  
and advises clients nationwide.



**H I G H L A N D**

# HOW WE HELP

Our credentialed advisors understand each client's unique challenges relative to macro-level issues facing the industry, and work closely alongside them to make informed investment decisions. We consider the role of each client's portfolio within the context of the organization.

Our services include:

1

## **INVESTMENT SERVICES**

*Portfolio Design and Implementation*

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2

## **BUSINESS SERVICES**

*Operational Support*

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3

## **REPORTING SERVICES**

*Customized Performance Reporting*

## INVESTMENT SERVICES

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We craft customized solutions that achieve desired goals based on specific investment resources and needs. These services include:

- managing enterprise risk
- aligning assets to mission
- determining portfolio and organizational objectives and constraints
- melding portfolio with risk tolerance
- designing investment policies
- researching capital markets or pursuing other topical research areas of focus
- allocating assets and recommending and selecting investment managers
- providing traditional advisory consulting
- performing as a discretionary outsourced manager of assets

## BUSINESS SERVICES

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Our business services typically are defined as:

- assisting in custodian searches
- coordinating and interacting with accountants, auditors and rating agencies
- managing back-office administrative tasks, such as negotiating and preparing manager and subscription agreements
- interfacing with custodians to process approved trades and reconcile client reports, and other operational duties and tasks
- providing client-specific education on the strategy and reasoning behind investment decisions

“ OUR MISSION is to build, preserve and strengthen client and industry relationships by delivering exemplary service and maintaining a passionate, skilled and engaged team. ”

**TREY ECHOLS**, *President and Chief Executive Officer*

## REPORTING SERVICES

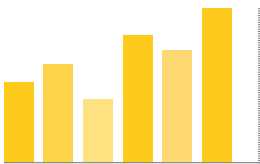
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Our reporting services ensure transparency and enhance our investment offerings. These services include:

- maintaining routine monthly and quarterly reporting
- facilitating internal (staff) and committee (governance) reporting
- managing presentations, meetings and ad hoc reporting to assist with audit and rating agency reviews and affiliate recommendations

### RESEARCH

In addition to portfolio reporting for our clients, our team regularly researches and reports broadly on capital markets, economic events, long-term macroeconomic themes, defined contribution changes, and asset classes.



# WHY HIGHLAND?

1

Our credentialed advisors have provided objective, research-driven investment counsel to not-for-profit healthcare entities and mission-based organizations for more than 30 years.

2

A hyper-awareness of financial market dynamics and a commitment to due diligence inform our forward-looking and customized investment management programs.

3

We are committed to building collaborative, supportive and candid relationships with our clients.

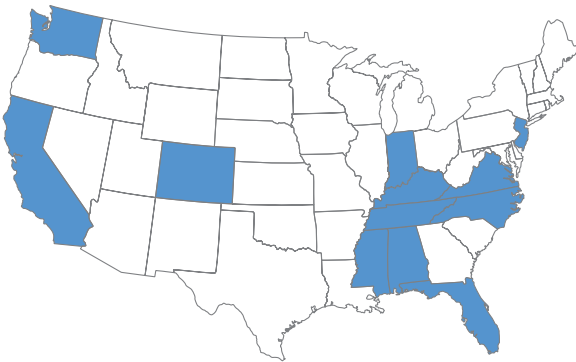
## OUR TEAM

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We are passionate investment professionals who are committed to serving as leading voices within the industry and thinking broadly to uncover opportunities for our clients. Our long-standing tenure with our clients proves the quality of our relationships.

## REPRESENTATIVE CLIENTS

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We are honored to advise mission-based organizations of varying size and complexity nationwide.



# CONTACT US

*Headquarters:*

## **BIRMINGHAM, ALABAMA**

2545 Highland Ave. S., Suite 200  
Birmingham, Alabama 35205-2478

*Phone:*

800.405.7729 | 205.933.8664

Fax 205.933.7688

## **NASHVILLE, TENNESSEE**

40 Burton Hills Blvd., Suite 200  
Nashville, TN 37215

*Web:*

[highlandassoc.com](http://highlandassoc.com)



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