



Journey to a Secure Future



Investment Leadership

- Comprehensive Consulting
- Socially Responsible Investing
- Best Practices and Culture Assessments
- Reconfiguration and Convergence
- ViaGem Foundation ProgramsSM

Our mission is to enable leaders to serve their organizations better.

Registered Investment Advisor

Investment Management Consulting

Improve overall investment results with a customized approach to meet your needs.

Socially Responsible Investing

Be agents of change by:

- Developing a distinct SRI criteria
- Screening, rating, and tracking portfolio holdings
- Searching and selecting SRI managers and funds
- Researching, collaborating and taking action
- Voting proxies conscientiously
- Engaging corporations through shareholder actions
- Investing in community (local and global) development

Stewardship Culture AssessmentSM

Understand, align, and facilitate change relating to organizational culture.



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Fiduciary Best Practices Assessments

Improve your process with the industry's best practices.

Reconfiguration

Convergence of multiple investment portfolios, structures, and cultures.

ViaGem Foundation ProgramsSM

Help organizations with financial needs in developing areas around the world.

We also provide educational programs and presentations, and serve as professional advisory committee members.

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