

Aspiriant: The 60-Second Overview

Who we are.

We're an innovative wealth management firm engineered to serve affluent clients and their families for generations.

Why we're different.

Our business model

We distribute ownership broadly and give team members the incentive to stay here forever, providing clients with wave after wave of reliable, innovative services.

Our talent

We attract a wide range of team members, all of whom share some common traits. They're intellectually intense, collaborative and compassionate. That's a potent blend.

Our attitude

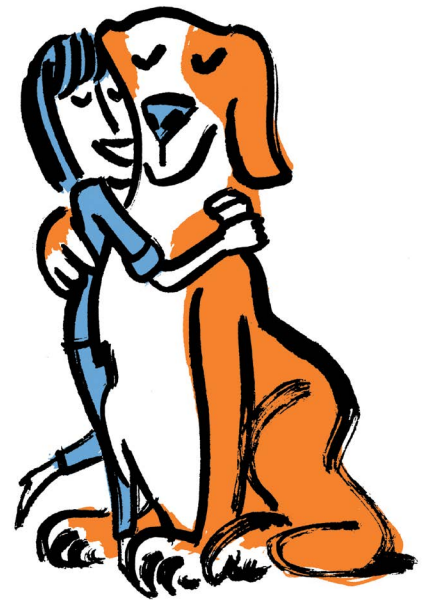
A strategic partner once compared us to "a cocker spaniel". We like the comparison. Our relationships with clients are professional first and foremost. They're also warm, passionate and genuine.

Our investment brain trust

Our in-house research and strategy operation features a prodigious roster of investment talent. Clients have direct access to a vast amount of investing acumen and intellectual horsepower.

Our independence

We have no parent company. We call our own shots, in order to align our interests and ambitions tightly with those of our clients.



At Aspiriant, we strive to institutionalize caring.

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Our clients

Our clients include entrepreneurs, philanthropists, executives and professional fiduciaries. They're smart, busy folks who expect a very high caliber of service. We hope they love working with our razor-sharp, warm-hearted team.

Our services

Every client gets a custom mix of services from these two categories:

Total Wealth Management

You benefit from meticulous, liberating financial planning, an investment strategy crafted by a team of investment heavyweights and an invigorating level of detailed, day-to-day implementation.

Exclusive Family Office

We can manage your entire wealth ecosystem, including financial planning, investment management, tax services, estate planning, risk management, strategic philanthropy and accounting and banking.

Offices

Los Angeles
San Francisco
San Diego
Silicon Valley
Irvine
New York
Boston
Cincinnati
Milwaukee
Minneapolis
Austin



By the numbers

- We have over 230 team members, ~one-third of whom are Partners.
- We have over \$13 billion in assets under management.



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