Consilium, LLC
Plan & Investment Consulting

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Advice Counsel Policy

The above three words are derived from the Latin term, Consilium. This guides us as we work to solve the critical financial issues facing clientele. As fiduciaries, this approach is not only what differentiates us, but also what makes us successful. We provide a broad range of services and solutions to help individuals, families, and organizations achieve their vision.

We operate on an independent, fee-for-service, basis and bring institutional characteristics to plan and investment consulting, along with experienced asset management. This blend of comprehension and capability is applied to guiding investors in all economic and market environments.

PHILOSOPHY

Consilium LLC's investment philosophy is embedded in financial academia and based on the notion that most public markets are efficient; asset & sub-asset allocation are the key determinants of portfolio risk and return. The alternative/private markets are decidedly different, where manager selection is paramount. In support of these principles, we create plan line-ups and portfolios to promote the following:

- Superior diversification from a dynamic core and satellite apportionment
- Comprehensive asset class & sub-asset class exposure
- Efficiently priced, manager of managers
- Elevated, risk-adjusted, returns

Our process is dedicated to an institutional approach to asset and wealth management with a commitment to low costs. Alongside many years of experience in the capital markets, our solutions are designed for all environments.

We are an institutional firm that manages assets based on a proven philosophy and processes. Consilium, LLC is well-matched for those looking for long term stewards of their funds.

Past performance is no guarantee of future results. Potential for profit is accompanied by possibility of loss. Data as of January 2022. Consilium, LLC ADV, Brochure and Privacy Policy available upon request.

Consilium, LLC – Registered Investment Advisor

Location
Boulder
Colorado

YEARS OF EXPERIENCE
30

CLIENT RELATIONSHIPS
Discretionary
Non-Discretionary
Deal Flow

INVESTMENT UNIVERSE
Public Markets
Private Markets
Direct

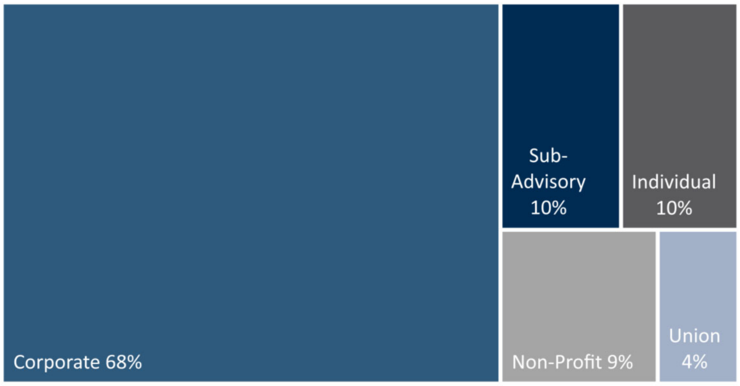
SERVICES

ASSET MANAGEMENT
- SEPARATELY MANAGED ACCOUNTS
- UNITIZED MANAGED FUNDS
- ENHANCED CASH

FINANCIAL CONCIERGE
- TECHNOLOGY PLATFORM
- TAX & ESTATE COORDINATION
- DEAL FLOW
- PHILANTHROPY
- FAMILY MEETINGS

PLAN CONSULTING
- INVESTMENT LINE-UPS
- BENCHMARKING
- EXPENSE ANALYSIS
- VENDOR MANAGEMENT
- PARTICIPANT ADVICE

TYPES OF CLIENTS



COMPOSITE INVESTMENT UNIVERSE