

ABW may provide stand-alone investment management services (without financial planning) to institutional clients or individual clients who receive financial planning or wealth management services from another firm.

We employ investment strategies and develop flexible spending policies based on sound academic research. Rather than trying to speculate which areas of the investment universe might "outperform" in the short term, we build well-diversified portfolios that provide consistent exposure to many dimensions of expected returns. Institutional investment products (not available to retail investors) generally form the base of client portfolios.

We have a special interest in providing investment management services to public or private foundations and endowments (see our [Charitable Planning services](#) and [3 Guiding Values](#) ). If you desire, we can incorporate socially aware and impact investing strategies that align with your institution's mission and values.