

THE BAHNSEN GROUP ANNOUNCES LAUNCH OF INSTITUTIONAL ADVISORY SERVICES

New resource of growing company focused on \$10-100 million segment of the market

[Newport Beach, CA] – The Bahnsen Group has launched a new internal resource to serve the institutional marketplace. Branded as TBG Institutional Advisory Services, TBG will leverage its organic connections to various not-for-profit organizations, universities, foundations, and endowments, with a special focus on the underserved \$10-100 million segment of the marketplace.

“We have long had organic connectivity to like-minded organizations whose missions we are aligned with,” says Managing Partner David Bahnsen. “This initiative is about organizing resources and focusing on how we can be a fully-equipped partner to serve this segment of the institutional marketplace. Our private wealth DNA gives us a lot of access to opportunities here, but we want to add the needed institutional DNA to be a premium partner for these types of clients.”

Robert Graham, a long-time member of the company who launched the Austin, TX office three years ago, will drive the initiative, along with Kenny Molina, the practice’s Director of Investment Solutions. The intent will be to serve as a full-service OCIO without dual-fee layering. The company will also be able to function as a direct equity-only manager, where appropriate, currently managing over \$4 billion in dividend growth equities. All institutional services will be offered under a 100% fiduciary umbrella.

“We launched a shareholder engagement and proxy voting initiative with Bowyer Research last year and want to take those substantial efforts to the institutional space, as well,” says Bahnsen. “From universities to churches to think tanks, there are organizations out there we can serve with a sophisticated service model, in a highly cost-efficient way, above and beyond the turnkey experience so many institutional clients currently receive. This is a very high priority for us and one that we believe aligns with our mission of being an opinion-forward organization unafraid of thought leadership and distinctive points of view.”

The Bahnsen Group currently manages \$8.2 billion of client capital and has 88 employees across ten office locations.

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