



FOR IMMEDIATE RELEASE

FiduciaryVest Reaffirms Long-term Commitment to its Institutional Investment Consulting Business While Announcing Changes to its Defined Contribution Practice

Managing Principal Jason Small, CFA, to lead the institutional investment consulting business

Atlanta, GA — (April 2, 2019) — FiduciaryVest, one of the nation's leading independent advisory firms serving institutional investors, today announced that it will now primarily focus on serving the investment and pension consulting needs of institutional clients, including healthcare, schools, and foundations and endowments.

FiduciaryVest has named Jason Small, CFA, Managing Principal and Senior Consultant, to lead FiduciaryVest as the firm continues to serve institutional investors with custom-tailored solutions. Two of the firm's three original founders lead FiduciaryVest's Investment Committee, assuring continuity at the firm's senior levels.

The retirement-plan advisory team that includes Philly Jones, Evan Melcher, Zack Sadler and Andy Marino will leave FiduciaryVest and join CapTrust.

FiduciaryVest continues to advise a broad range of pensions, foundations and endowments, including healthcare foundations, school and university endowments, charitable semi-public funds, community and private foundations. Working most effectively as an extension of our clients' investment committees, FiduciaryVest consults on formulating spending policy, developing and managing investment policy, and helping to create optimal investment implementation, monitoring and governance structures for each client mandate.

"Harold Small and I have always committed ourselves to driving the team at FiduciaryVest towards continuous improvement of our proven investment process," said FiduciaryVest founder J. Gregg Buckalew. "This pursuit of excellence, combined with Jason's new leadership and the experience and dedication of our institutional client relationship team, will drive better outcomes for our institutional clients."

FiduciaryVest is 100% independent and was constructed from the ground up to avoid any conflicts of interest. The firm has no proprietary products to sell, and no sources of revenue that could influence its advisory services. Our consultants deliver tailored solutions, hand-crafted to meet each client's unique needs.

“We are proud of the sterling reputation FiduciaryVest has built and maintained since our firm was founded in 2005, and we look forward to continuing to provide trustee-directed, non-profit clients with the fiduciary-level support and investment advisory services they’ve come to expect from us,” said Jason Small. “We also wish Philly, Evan, Zack, Andy and their support team every continued success,” he added.

About FiduciaryVest

FiduciaryVest was founded in 2005 to serve fiduciaries, offering institutional investors independent investment advice. From day one, our team has shared the same focus: to provide proactive, objective investment consulting services. As of March 31, 2019, the firm advised on more than \$5 billion in client assets. The firm maintains offices in Atlanta and Philadelphia and serves clients across the United States.

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