

Pioneering what's possible

Since 1988, we've served as the trusted investment office for families and nonprofits, pioneering what's possible for their portfolios to support meaningful lives and missions.

More than 35 years ago, Hirtle & Co. established the first outsourced investment office around a clear belief: Every institution and family deserves an investment partner with the essential knowledge and fundamental alignment of an experienced in-house team.

Our structure is designed to replicate that of the most sophisticated investment programs led by a highly qualified Chief Investment Officer. We aim to bring the

same powerful benefits to families and organizations who prefer outsourcing over building and managing an in-house team.

In choosing us as an investment partner, you gain access to a fully resourced, multi-billion-dollar investment office with global investment capability and nearly four decades of experience across market cycles.

Our approach is centered around making it personal. We serve as your dedicated advocate in the investment marketplace, helping you navigate endless choices and constant information flow.

Merging our deep industry knowledge with a holistic understanding of your needs, we craft portfolios strategically allocated and dynamically managed for value creation.

At a Glance

35+

Years of
Experience

\$26B

in Firmwide
Assets Under
Management

242

Clients:
Families and
Charitable
Institutions

95

Professionals
Across
Six Offices
Nationally

95%

Retention of
Clients Over the
Past 10 Years

100%

Privately-
Owned

Data is as of March 31, 2026. Client retention rate is for 10 years and reflects our core client base of clients with over \$10 million in assets.

TO LEARN MORE, VISIT WWW.HIRTLE.COM