

THE HARVEST ADVANTAGE



\$12+ billion AUM¹ investment manager founded in April 2008

Demonstrated success through the global financial crisis and other significant market events



Vetted and approved by numerous investment consulting firms, independent RIA platforms, and large broker-dealers

Experienced team of 15 investment professionals with deep portfolio management, client servicing, operational and technology backgrounds



Robust infrastructure that integrates proprietary systems and processes with third-party custodians

Full service solutions delivered with an emphasis on education, transparency and access



Footnote: 1. As of June 30th, 2018, and reflects total firm notional and capital under management