

## FACT SHEET

### **PURPOSE**

First, we are committed to managing charitable gifts and financial assets for nonprofit organizations. A variety of investment services and expertise are offered to our clients including asset management, gift planning and account support services.

Secondly, we strive to meet the needs of individuals who have the desire to financially support charitable organizations. HighGround offers customized and transparent solutions for endowment management and gift planning support designed to deliver the results our clients need to further their mission and life transforming work.

### **WHY HIGHGROUND**

#### **WE PROTECT.**

We partner with our clients. Our values, mission and purpose are focused on serving you and we have spent nearly a century dedicated to the nonprofit sector. Your success is our success. We serve you with a spirit of respect, transparency and honesty. Because our greatest strength is defined not only by the numbers we generate, but by the bonds we create – some since 1930.

#### **WE STRENGTHEN.**

When partnering with HighGround, you can be confident that your long-term goals are attainable. By focusing on tailor-made solutions to meet your financial and investment objectives, with the support of investment specialists to handle complex assets, legal experts to compliment and extend your efforts and account support professionals to deliver sub-accounting and reporting, we are your total endowment solution.

#### **WE GROW.**

Our results speak for themselves. And while this gives us confidence, we look to the future rather than the past. We exhibit high standards because ours is a higher calling.

### **QUICK FACTS**

- Founded in 1930, headquarters in Dallas, TX
- In 1996, established HighGround Trust Company, a TDOB regulated trust company
- Over \$2 billion under management
- Currently serving 450 nonprofits, churches and beneficiaries
- Managing approximately 950 trusts, annuities, donor-advised funds and 6,700 client accounts
- 50 employees

### **LEADERSHIP TEAM**

Jeff W. Smith, J.D.  
Ben Curry, CPA  
David M. Slover  
Joe H. Wright, Jr.  
Kari L. McGregor, CPA  
Joe Hancock, J.D.

President and Chief Executive Officer  
Senior Vice President and Chief Operating Officer  
Senior Vice President and Chief Strategy Officer  
Senior Vice President and Chief Investment Officer  
Vice President and Chief Financial Officer  
Vice President and General Counsel