

FACT SHEET

PURPOSE

Founded in 1930, HighGround Advisors is a nonprofit investment management and trust services company with \$2.3 billion in assets. Our purpose is to advance the life-transforming work of our nonprofit client partners, and those who support them, by protecting, strengthening and growing the assets they entrust to us. Our areas of expertise include: endowment and investment management, real estate and minerals management, and gift planning. Our subsidiary, HighGround Trust Company, was established in 1996 and is chartered by the Texas Department of Banking.

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. With tailor-made solutions to meet your financial and investment objectives and the support of investment specialists to handle complex assets, legal experts to complement 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
- \$2.3 billion under management
- Currently serving 470 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.

Helge Rokenes

President and Chief Executive Officer

Senior Vice President and Chief Operating Officer

Senior Vice President and Chief Strategy Officer

Senior Vice President

Vice President and Chief Financial Officer

Vice President and General Counsel

Vice President and Chief Investment Officer