First Ascent Asset Management

WHO IS FIRST ASCENT & WHAT DO WE DO?

First Ascent is an asset management firm that supports independent financial advisors across the country with a wide range of investment-related services.

It Takes a Team

When you work with a financial advisor from a large bank or a traditional Wall Street brokerage firm, that advisor is backed-up by a team that provides a range of support services. You may be unaware of their efforts behind the scenes, but they are essential to the advisor's work.

That team:

- constructs client portfolios
- provides investment research
- trades and manages accounts
- generates performance reports
- performs account administrative services
- creates commentary and educational material
- offers tools to help advisors better serve clients

At a bank or brokerage firm, the advisor and the back-up team operate under a single corporate umbrella. The products, services, and priorities of the advisor and the back-up team are set by the corporate parent. Their offering may include proprietary, in-house products and their loyalties may be split between serving their clients and improving the bottom line for their shareholders.

Many advisors prefer to operate under a more independent business model that allows them to focus more clearly on serving the best interests of their clients. Under the independent model, they have more freedom, flexibility, and objectivity in the advice they offer their clients.

Independent advisors often retain the services of one or more firms to provide the type of back-up support previously described. **First Ascent is one such firm.**

We are investment specialists who partner with and stand behind your financial advisor. Your advisor works with you to identify and articulate your goals, objectives, and financial aspirations and then determines how best to achieve them. That's when we get involved.

Your Team Working For You

At the direction of your advisor, we build and manage portfolios designed to help you achieve those goals, objectives, and aspirations. We assume the burden of trading and rebalancing your account. We monitor the investments in your account and process any contributions or withdrawals. Quarterly, we prepare reports showing the performance of your portfolio.

We also provide investment commentary, research, and analytical tools to help your advisor better navigate the financial markets. We also provide educational materials designed to help you become a more successful investor.

Consider us the people in your advisor's virtual back room who specialize in implementing aspects of the plan established by you and you advisor to help secure your financial future.