First Ascent Asset Management

Background

Founded in 2015, First Ascent Asset Management provides outsourced portfolio management for financial advisors.

Our Mission

- To start and end every conversation by asking, “What is best for our clients?”
- To build and manage the best possible portfolios for long-term investors.
- To create clear, concise educational material to help clients become better investors.
- To structure and manage our firm with the goal of keeping fees and expenses low.
- To support the needs of advisors with a talented, dedicated group of professionals.

Our Purpose

We aspire to create a corner of the world where clients truly do come first.
Most investment firms say they care about their clients, but actions speak louder than words. Many seem more focused on themselves than on helping clients reach their goals. We think there’s a better way.

It starts with maintaining a culture of investment excellence.
We’ve assembled a highly skilled and experienced team of professionals whose sole focus is managing portfolios tailored to our clients’ needs. We even established an independent, outside investment committee to work with our internal investment professionals to bring new perspectives, an added level of objectivity and additional expertise.

Maintaining our independence and objectivity is important.
We don’t use proprietary products in our portfolios or accept payments from the firms whose products we do use. We control our own destiny and are not beholden to anyone whose interests conflict with those of our clients.

Investor behavior determines investment success.
We offer multi-media educational material designed to help clients become better investors. Investor education is so important we make our material available to everyone. Visit our Knowledge Center.

Keeping fees low helps clients reach their goals faster.
We have intentionally structured our firm so our costs are low and clients get to share in the efficiency we gain through technology. Our flat fee pricing is simple and very transparent. You know at the beginning of each year what you’re going to pay and the fee never changes, no matter how large your account becomes.

We are united in a common mission—helping our clients reach their financial goals.
Our formula for accomplishing this is investment excellence, objectivity, investor education, low fees and an experienced team. We don’t expect to change the world—just a little corner of it.