

Canterbury Celebrates 20 Years in Business

This year we are proudly announcing an important milestone: 2008 marks Canterbury's 20th year in the consulting business.

1988
Canterbury Consulting was founded on December 8, 1988 to provide institutions and private clients with *independent* investment advice. While we have always been 100% employee-owned, our staff has grown from just six individuals back in 1988 to over 50 today. Our headquarters are still in our original office building in Newport Beach, but we have expanded to include an office in Seattle, Washington to serve our growing Pacific Northwest clientele. Our primary focus is still providing consulting services to institutions including endowments, foundations, charitable organizations, health care corporations and retirement plans as well as individuals including taxable clients, family offices and family limited partnerships. We continue to concentrate on serving clients in the Western United States and today we supervise \$10 billion in client assets.



We attribute our long-standing success to three key areas: (1) Our loyal clients who have allowed us to partner with them in steering the assets that let them carry out their unique mission, (2) Our talented and dedicated staff who work tirelessly on behalf of our clients to provide the best possible service and (3) Our consulting philosophy which is based on the belief that every client situation is unique and the best way to serve our clients is to customize solutions to meet their individual needs.

2008
At Canterbury it is our desire to be an active partner with our clients to understand all aspects of their investment program, to convey knowledgeable guidance, and to provide exceptional service. Canterbury's mission remains the same today as it was in 1988: *to provide knowledgeable, comprehensive and independent investment management advice to help our institutional and individual clients meet their financial objectives.*

Canterbury's key differentiators and strengths:

- Our ability to find exceptional money management firms to recommend to our clients
- An independent business model that allows us to provide truly objective advice
- The experience and maturity of our staff and firm
- A focused target market that lets us leverage our knowledge
- Timely, accurate and customized reporting



CANTERBURY CONSULTING

20
years