

## FACT SHEET

### PURPOSE

Founded in 1930, HighGround Advisors is a nonprofit investment management and trust services company with over \$3.0 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: short- and long-term 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 investment 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
- \$3.0+ billion under management
- Currently serving over 550 nonprofits, churches and beneficiaries
- Managing nearly 7,500 client accounts
- 50+ employees

### LEADERSHIP TEAM

Jeff W. Smith, J.D.	President and Chief Executive Officer
Ben Curry, CPA	Senior Vice President and Chief Operating Officer
David M. Slover	Senior Vice President and Chief Strategy Officer
Kari L. McGregor, CPA	Senior Vice President and Chief Financial Officer
Helge Rokenes, CFA, CAIA	Vice President and Chief Investment Officer
Joe Hancock, J.D.	Senior Vice President and Chief Legal Officer
Kellie Morrison, CFA	Senior Director of Client Investment Solutions, Senior Vice President and Investment Officer of HighGround Trust Company
Jordan Lovelady	Assistant Vice President for Client Investment Solutions
Lacy Cagle	Assistant Vice President for Marketing & Communications