

For Immediate Release

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**HighGround Advisors Names Helge Rokenes as
Next Chief Investment Officer**

Dallas, TX (June 16, 2021) – HighGround Advisors, an investment management company with over \$2 billion in AUM, today announced the appointment of Helge Rokenes, CFA, CAIA, to Chief Investment Officer (CIO), effective August 2, 2021. Previously, Rokenes served as the Managing Director of the Meadows Foundation since 2014. Rokenes was drawn to HighGround because of its professional excellence, deep-rooted history and strong purpose, and he is looking forward to joining HighGround in advancing the missions of their client partners.

Rokenes will report to Jeff W. Smith, President and CEO of HighGround Advisors. “We are pleased Helge will be joining the leadership team at HighGround Advisors,” Smith said. “Helge shares HighGround’s commitment to professional excellence and has the right combination of investment leadership and technical experience to fill this critical position. Leveraging his extensive knowledge, he will play a key role as we continue to build on HighGround’s 91-year history of providing financial services to nonprofit organizations and families dedicated to transforming lives.” HighGround Advisors Board Chairman Carrol R. McGinnis echoed Jeff’s sentiments, “The board is confident Helge has the skillset and business acumen needed to grow HighGround’s investment platform.”

Rokenes will serve alongside current HighGround CIO Joe Wright throughout the fall until Wright’s retirement on December 31, 2021. “After serving HighGround for 20 years, I’m delighted that Helge will be my successor,” Wright said, “Helge is a proven investment professional with the expertise and leadership skills to build upon HighGround’s history of investment management excellence. I look forward to working with Helge over the next few months during the transition period and wish him the best in his new role.” Rokenes will provide a fresh perspective to further shape HighGround’s well-established investment program and lead HighGround’s investment team to deliver exceptional asset management.

Helge, who has almost 20 years of investment management experience, joins HighGround from the Meadows Foundation, where he managed the Foundation’s investment portfolio. The Meadows Foundation is a \$700 million private foundation established in 1948 that has funded more than \$1.2 billion in grants to various charities. Prior to the Meadows Foundation, he was Investment Manager for ABH Capital Management and an Institutional Sales Analyst for JP Morgan Asset Management. He earned a Bachelor of Arts from Texas Lutheran University and a Master of Business Administration from Baylor University.

When asked how his experience has prepared him for this role at HighGround, Helge said that in his nearly two-decade career managing capital for institutions and high net worth families, he has learned to expect the unexpected. “HighGround has a solid reputation of keeping a long-term focus and staying disciplined during periods of volatility. Clients can rest assured that the investment team will continue to diligently protect, strengthen and grow their assets through all seasons,” said Rokenes.

“Helge’s appointment comes at an important time for HighGround Advisors,” Smith said. “Our clients come first, and we are committed to offering the flexible investment management solutions needed so our client partners can remain focused on their important missions.”

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About HighGround Advisors

Since 1930, HighGround Advisors has provided nonprofit investment management and gift planning services. Our subsidiary, HighGround Trust Company, was established in 1996 and is chartered by the Texas Department of Banking. Together, we have extensive financial knowledge in the nonprofit sector, with over \$2 billion in assets under management and serving over 450 nonprofits and beneficiaries. Our mission is to serve the important missions of our nonprofit client partners by protecting, strengthening and growing their assets. Among others, clients include Baylor University, Buckner International, Texas Rangers Baseball Foundation, Pine Cove, Texas Tech Foundation, Baylor Scott & White Healthcare Foundation, University of North Texas Foundation and Mercer University.