



The Value of First Ascent - VMX Platform

An Investment Firm Truly Driven by Client Needs

First Ascent is an investment firm that builds low-cost, diversified, high conviction portfolios for the clients of financial advisors. First Ascent's team is a group of industry veterans who came together around the common idea of questioning established practices and keeping only those that truly benefit clients.

Elegantly Simple Portfolio Construction

The financial services world has fallen in love with complexity. Our investment process is designed to be sophisticated in its simplicity.

We focus on controlling important elements such as costs, turnover and diversification. We do this by combining low-cost passive management with selective, high conviction active management to achieve broad global diversification, access to alternative investment strategies, and low internal expenses.

Additionally, by holding fewer positions, we seek to reduce transaction costs and tax liabilities within each account. We also provide tax-sensitive portfolios for taxable accounts.

Focus on Service

First Ascent provides a high level of personal service and support to the advisors that we work with. We don't have a call center. Instead, you have a consistent service and support team to join client calls, provide analysis, and answer any questions. Our team is here to support you in any way we can.

Experienced Team

First Ascent's investment team is knowledgeable and experienced. Our Investment Committee consists of 7 members including 5 CFAs, a Ph.D. Economist, and a CFP[®]. You receive the benefit of our advice and support, as well as over 120 years of experience managing portfolios for clients.

Additionally, our investment team is made up of both internal and independent committee members. Our independent committee members come from different parts of the investment world and bring insight, objectivity, and fresh perspectives to all of our decision making.

First Ascent Asset Management is a registered investment advisor under the laws of the State of Colorado. The information contained herein does not constitute investment advice or a solicitation by First Ascent Asset Management. Investments are not guaranteed and are subject to investment risk, including possible loss of the principal amount invested.