

Ascent Investment Partners – Fixed Income Investing



Ascent Investment Partners is based in St. Louis and was formed to meet the unique needs of fixed income investors. Because safety and stability are the primary reasons investors include a fixed income allocation in their portfolios, we carefully balance risk and after-tax return in every investment decision. Our approach is slow and steady, research-driven and disciplined.

Since we are singularly focused on the fixed income markets, we can uncover opportunities to add value while also determining when a trade is cost-efficient. We never sacrifice credit quality for incremental yield and always seek a competitive total return.

We offer both taxable and tax-exempt fixed-income investment strategies with flexibility to meet individual clients' time horizons and tax needs. The primary objective of all strategies is to achieve a competitive total return, within the framework of a conservative risk tolerance.

Strategies Offered: Municipal Fixed Income, Intermediate Taxable Fixed Income, Core Taxable Fixed Income

from  Montage Investments

Driven by Independence



Recommending investments to clients requires more knowledge and expertise than ever. And keeping up with a changing investment universe isn't easy. In the past year, the number of open-end mutual funds totaled over 7,500 while the number of closed-end funds, ETF choices and alternative vehicles continue to grow.

In such an environment, which shows no sign of abating, we think clients are well served by a best-of-breed approach to money manager selection. History has shown that no one investment manager, no matter how large, no matter how global, no matter how excellent a single product offering, can be all things to all advisors and investors. So we think that a well-defined, selection process that focuses only on the best of the best in each asset class and style is essential for success.

Montage brings together world-class, institutional investment managers – each offering a distinct approach to asset management that reflects many decades of professional experience and proprietary investment strategies across global asset classes. Our organizational approach is to allow individual investment managers to retain boutique processes, talent and culture that have proven records of adding value to portfolios and meeting client objectives.

Today, we manage over \$9 billion, while retaining organizational uniqueness and flexibility, allowing our investment managers to focus on what they do best.

- Our portfolio managers average over 20 years of investment experience.
- Our leadership has spent all of their careers managing money at leading fund families, banks, brokerage firms and hedge funds. They've learned first-hand how to meet challenges that can affect a company's ability to serve clients.
- Each investment manager has an independent, well-defined investment process and portfolio management discipline.
- Our organization has operations nationwide, and offers a virtual network of the best investment talent available in an effort to avoid the biases of any geography.

Talk to your advisor or investment consultant today about how our solutions can work within many long-term investment strategies to meet a wide variety of investment goals.

