

SAGE ADVISORY SERVICES, LTD.

5900 Southwest Parkway, Bldg 1

Austin, Texas 78735

www.sageadvisory.com

1996

Year
Founded

\$29.6B

AUM/AUA as of
9/30/2025

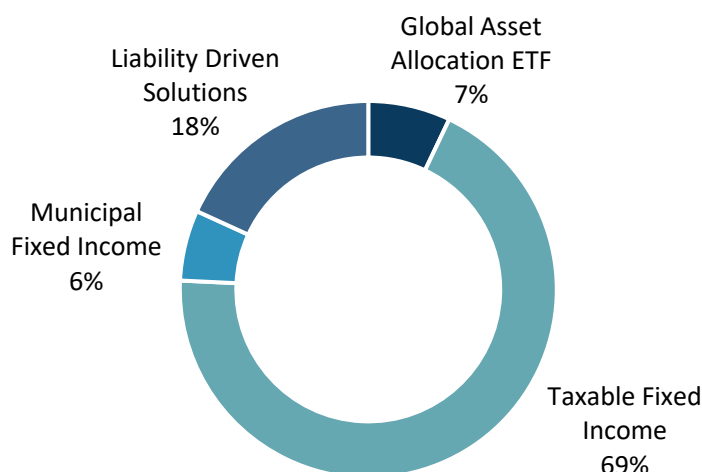
58

Employees

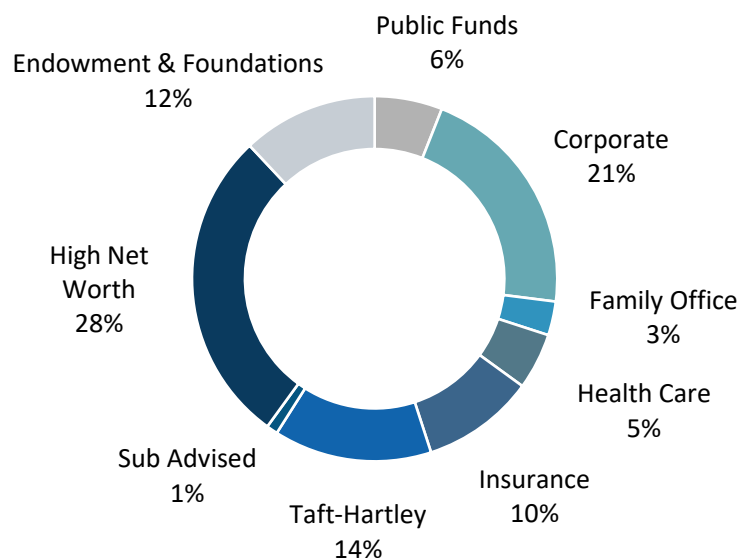
18

Investment
Professionals

AUM/AUA Distribution



Client Distribution



Why Sage

Agility

Our size and independence as an employee-controlled firm enable us to take a nimble approach.

Alignment

We customize the investment experience to align with each client's unique objectives and needs.

Consistency

We have a tenured investment team and proven process that enable us to deliver expected results.

Culture

We are committed to cultivating a culture of service and trust among our clients, our employees, and our community.

Sage Strategies & Services



Platform Availability

19 Firms

Fixed Income
UMA/SMA

26 Firms

ETF Model
Platforms

6 Firms

Cash Balance
Platforms

9 Firms

Dual Contract
Platforms

Investment Process

