

# SAGE ADVISORY SERVICES, LTD.

5900 Southwest Parkway, Bldg 1  
Austin, Texas 78735  
www.sageadvisory.com

1996

Year  
Founded

\$30.5B

AUM/AUA as of  
3/31/2026

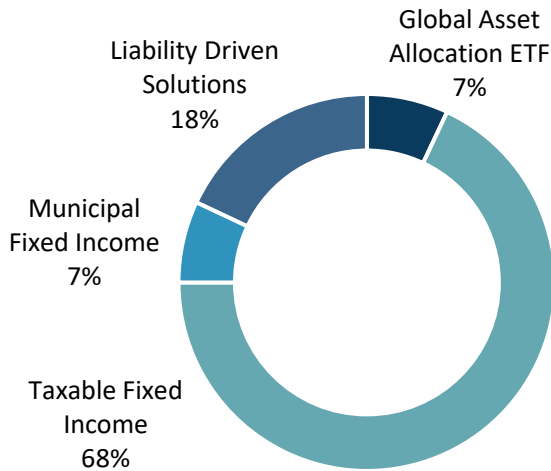
58

Employees

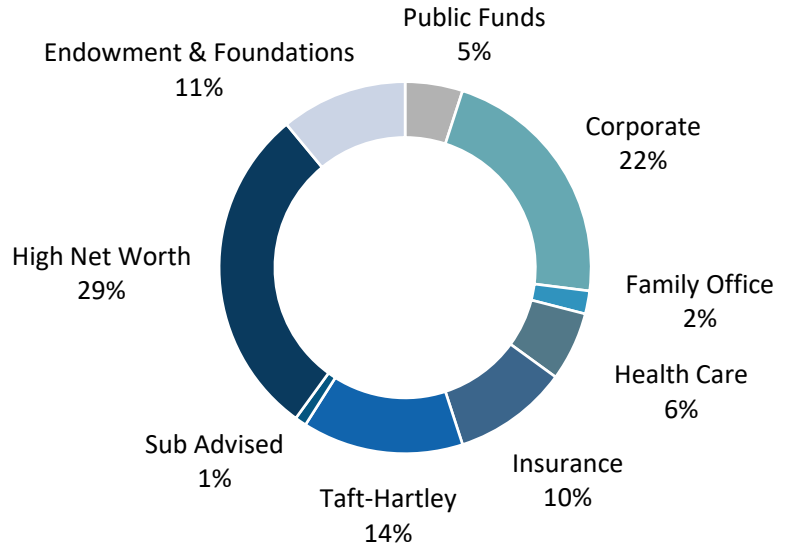
17

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

**Taxable Fixed Income**

- Enhanced Cash Management
- Short Term
- Moderate Term
- Intermediate Term
- Int. Term Corporate
- Core Aggregate
- Core Gov/Credit
- Long Gov/Credit

**Specialty**

- Government Only
- Insurance

**Tax-Exempt Fixed Income**

**Total Return**

- Moderate Term
- Intermediate Term
- Core

**Laddered Maturity**

- 1-5 Yr | 1-10 Yr | 1-15 Yr

**Specialty**

- State Specific
- State Preferred

**Responsible Investing**

- Cash Management
- Short Term Fixed Income
- Intermediate Term Fixed Income
- Core Fixed Income
- Core Plus Fixed Income ETF
- Conservative ETF
- Moderate ETF
- Growth ETF
- Global Equity ETF

**Global ETF**

- Core Plus Fixed Income
- Global Equity
- Conservative
- Moderate
- Moderate Growth
- Growth
- Multi Asset Income

**Retirement Plan Solutions**

- Liability Driven Investing
- Corporate DB
- Public DB
- Taft Hartley DB
- Cash Balance
- Target Date Strategies
- Fiduciary 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

