



MARKETING FOR **ASPIRIANT**

CASE STUDY



ASPIRIANT

ABOUT THE CLIENT

An independent firm owned by more than 40 owner operators, Aspiriant is a leading independent wealth management firm with offices in Los Angeles, Boston, Cincinnati, New York, San Francisco, Milwaukee and Minneapolis. Aspiriant is passionate about the value financial planning and integrated wealth management services bring to high net worth individuals and families with complex needs and prides itself on enduring client relationships that span generations. The firm's mission is to improve the quality of our clients' lives...resulting in greater satisfaction, peace of mind, and freedom for them to achieve more in life.

capabilities: brand identity marketing strategy web design and development graphic design copywriting

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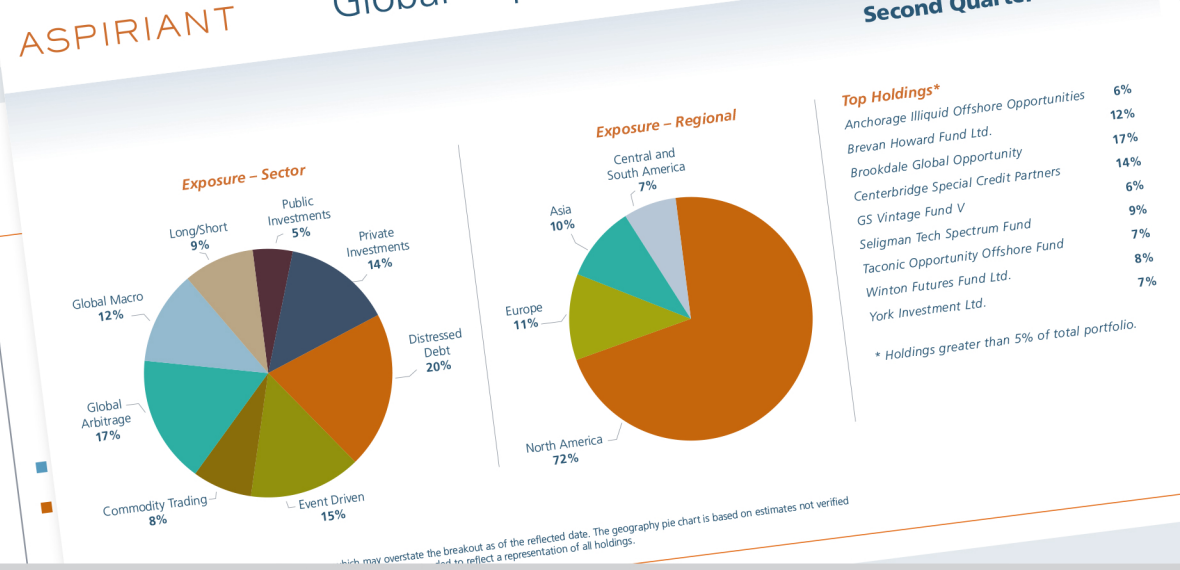


ASPIRIANT Global Equity Second Q

Performance Comparison and Summary

	2Q 2012	Trailing 1-Yr	Trailing 2-Yr	Trailing 3-Yr
GCO (Cayman)*	-2.8%	-2.0%	6.1%	8.5%
HFRI FOF	-3.1%	-5.8%	0.9%	2.2%
S&P 500	-2.8%	5.5%	17.4%	16.4%

Returns by Strategy 2Q & Since Inception



THE SCENARIO

Aspiriant was not pleased with the status of their current marketing and advertising program. Internally, the client had a successful marketing team but workload demanded outsourcing to freelancers and an agency. This scenario created chronic inconsistency in the company's messaging, brand application and collateral design. Aspiriant sought out a single-source agency to handle the full scope of work in a highly responsive, consistent and integrated manner.

THE SOLUTION

Out of the gate, SRM became Aspiriant's go-to source for all of their marketing and advertising needs through a monthly retainer. SRM designed the Aspiriant *Insight* newsletter and an email template to deliver market, tax and investment insights and rich financial content to Aspiriant's clients. Proforma has created numerous designed templates for the internal marketing team's use and print materials for their clients, consistently applying the brand standards. SRM also was integral to supporting the launch of a pioneering risk-managed global equity fund offering – the Aspiriant Risk-Managed Global Equity (RGE) Fund (Ticker: RMEAX). Following an in-depth discovery and brainstorming session with the client, Proforma's editorial team crafted the core messaging about the fund and the design and web teams set about developing the website, prospectus, fact sheet and related financial collateral for Aspiriant to provide to prospective investors and ultimately owners of the mutual fund.



ASPIRIANT

ABOUT ASPIRIANT

The Aspiriant Risk-Managed Global Equity Fund seeks to deliver three goals:



Growth. Achieve growth through long-term capital appreciation.



Income. Generate additional income and reduce volatility through covered call writing.



Protection. Protect the value of

Aspiriant is the leading independent wealth management firm in the United States.

Our firm draws upon deep roots within the wealth management industry. Aspiriant was formed in 2008 when two highly regarded firms, Kochis Fitz (San Francisco, founded in 1991) and Quintile Wealth Management (Los Angeles, founded in 2002), combined to provide a full suite of sophisticated, integrated wealth management services.

Aspiriant is 100% owned by our key employees.

Our ownership structure, unlike many other wealth management firms, ensures Aspiriant's ownership is held by our employees. As an employee-owned firm, Aspiriant is not subject to the interests of banks and brokerages.

Investment solutions and personal wealth aspirations.

improve clients' lives by creating and implementing investment portfolios to meet their own

fees, risks, charges and expenses contains this and other information .9971 and should be read carefully prior

you could lose money on your investment

Quick Facts

Ticker Symbol
RMEAX

CUSIP
04537V105

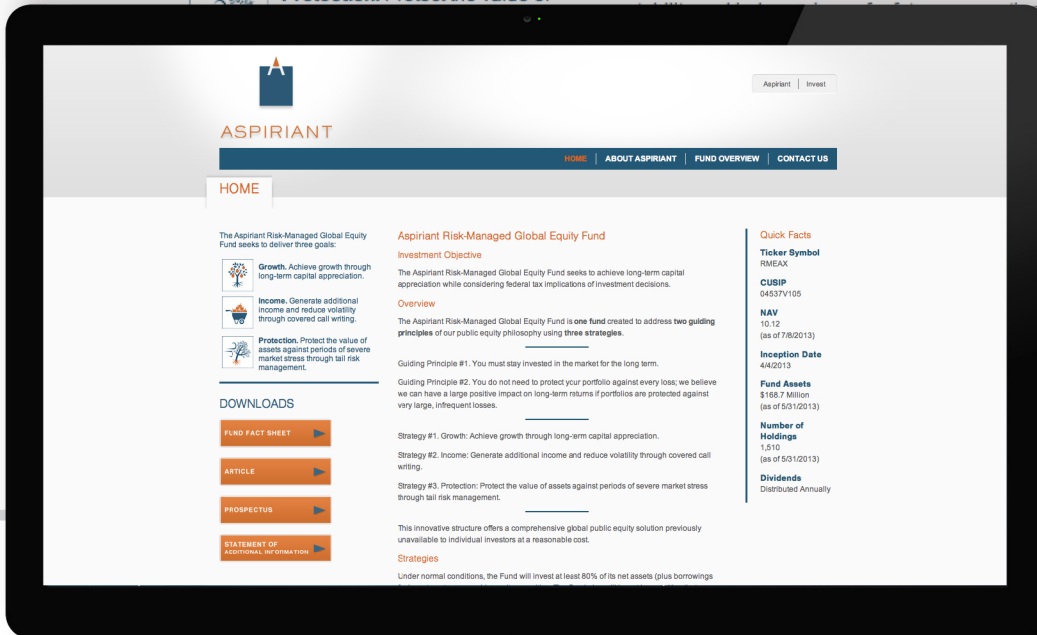
NAV
10.18
(as of 7/10/2013)

Inception Date
4/4/2013

Fund Assets
\$168.7 Million
(as of 5/31/2013)

Number of Holdings
1,510
(as of 5/31/2013)

Dividends
Distributed Annually



ASPIRIANT WEBSITE



