

SAGE ADVISORY SERVICES, LTD.

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

1996

Year
Founded

\$31B

AUM/AUA as of
3/31/2026

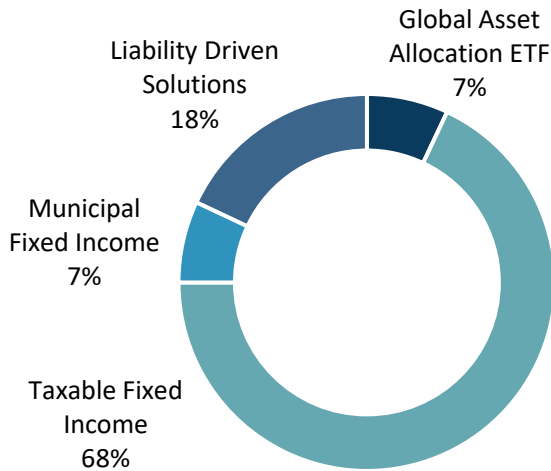
58

Employees

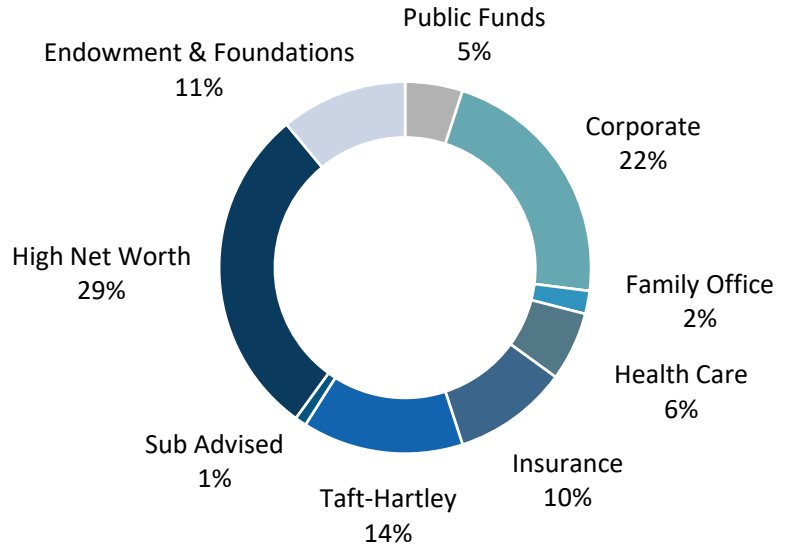
17

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

