



Bailard Named to Financial Times' '300 Top Registered Investment Advisers' for Third Consecutive Year

FOSTER CITY, CA – June 27, 2019 – Bailard is pleased to announce it has been named to the 2019 edition of the Financial Times 300 Top Registered Investment Advisers for the third consecutive year. The list recognizes top independent RIA firms from across the US that have demonstrated excellence in six areas: assets under management (AUM); AUM growth rate; years in existence; advanced industry credentials of the firm's advisers; online accessibility; and compliance records.

"We are incredibly honored to return to the FT's list of top RIAs for the third year in a row, and we thank them for this honor," said Peter Hill, Bailard's chairman and CEO. "The six criteria are all critically important to Bailard as a firm, but 'years in existence' is particularly dear to us this year, as we are celebrating our 50th anniversary as a firm."

This recognition adds to Bailard's multiple industry accolades in the past year. In 2018, they were named among the Best Places to Work in Money Management by Pensions & Investments, demonstrating the firm's commitment to excellence across their business lines and in their company culture.

"At Bailard, we are constantly striving to improve within our firm and maintain our position as leaders across the industry, in terms of our credentials, strategies, and values," said Sonya Mughal, chief operating officer and chief risk officer at Bailard. "We are proud of the strong culture of excellence in client service and investment management that we have built and look forward to what the next 50 years will bring."

This is the sixth annual FT 300 list, produced independently by the *Financial Times* in collaboration with Ignites Research, a subsidiary of the FT that provides business intelligence on the asset management industry. The final FT 300 represents an impressive cohort of elite RIA firms, as the "average" practice in this year's list has been in existence for over 22 years and manages \$4.6 billion in assets. The FT 300 Top RIAs hail from 37 states.

The FT 300 is one in a series of rankings of top advisers by the *Financial Times*, including the FT 401 (DC retirement plan advisers) and the FT 400 (broker-dealer advisers). There are no fees or other considerations required of RIAs that apply for the FT 300. To view the full 2019 FT 300 list, please visit <https://on.ft.com/2X46Wxt>.

About the Financial Times 300 Top Registered Investment Advisers

The Financial Times 300 Top Registered Investment Advisers is an independent listing produced annually by the *Financial Times* (June 2019). The FT 300 is based on data gathered from RIA firms, regulatory disclosures, and the FT's research. The listing reflected each practice's performance in six primary areas: assets under management, asset growth, compliance record, years in existence, credentials and online accessibility. This award does not evaluate the quality of services provided to clients and is not indicative of the practice's future performance. Neither the RIA firms nor their employees pay a fee to the *Financial Times*.

in exchange for inclusion in the FT 300. According to its website, the *Financial Times* “is one of the world’s leading news organizations, recognized internationally for its authority, integrity and accuracy. It is part of Nikkei Inc., which provides a broad range of information, news and services for the global business community.”

About Bailard, Inc.

With 50 years of experience, Bailard is an independent, boutique wealth and investment management firm that combines proven, proprietary methodologies with innovative new strategies to drive success for clients. The firm’s wealth management team creates bespoke financial plans that grow with a client’s individual goals over time, with offerings that include differentiated strategies in real estate and Sustainable, Responsible and Impact Investing, as well as flagship equity strategies. Bailard’s institutional asset management offerings span single asset-class strategies where Bailard’s best-in-class research team has unearthed a definable advantage. With \$3.6 billion AUM as of March 31, 2019, Bailard’s high-touch client service and proven track record are grounded in the firm’s core values of openness, fairness, excellence and courage.* To learn more about Bailard, please visit <https://www.bailard.com> or contact Michael Faust, Executive Vice President and Director of Wealth Management at (650) 571-5800.

** All investments involve a risk of loss. There is no guarantee any strategy will achieve its objectives. Bailard will not offer advice in any jurisdiction where it is prohibited from doing so. Real estate and alternative investments have significant specific risks and are not appropriate for all investors. The application of various environmental, social and governance screens may result in the exclusion of securities that might otherwise merit investment, potentially adversely affecting performance.*