

**Bailard, Inc. Launches Foundation in  
Celebration of the Firm's 50th Anniversary**

*The Bailard Foundation will make impact investments to improve the community*

**FOSTER CITY, Calif. – October 3, 2019** – Bailard, a wealth and investment management firm based in the San Francisco Bay Area, today announced the establishment of the Bailard Foundation. The Foundation will invest in initiatives that the firm, its employees, and its clients value, and represents Bailard's continued commitment to improve the communities in which it and its people live, work, and engage.

The launch of the Foundation corresponds with the 50th anniversary of Bailard's founding.

"In my tenure at the firm, and in the firm's 50 years in the Bay Area, I am proud of Bailard's strength of conviction in maintaining a values-driven approach in how we engage with our clients, our employees, and our community," said Peter Hill, the CEO of Bailard. "We are excited to watch this Foundation grow as the next step in this conviction."

Bailard partnered with Bay Area-based Philanthropic Ventures Foundation (PVF) to administer the Foundation and put forth ideas, as requested, for impact investments. On the Foundation board of directors are friends of Bailard, Inc.—including chairwoman Terri Bailard, widow of firm co-founder Tom Bailard—and current employees. Contributions for impact investments are open, but initial capital will be provided by the firm and employees. The board hopes the Foundation will ultimately become self-sustaining.

Bailard's history is steeped in community involvement. The firm founders originally hosted financial planning courses and wrote a textbook to improve financial literacy within their community. Last month, Bailard rolled out its core corporate values, which include accountability, compassion, courage, excellence, fairness, and independence.

"The firm has always been a values-driven company," said Kim Aquino, CFP®, a Senior Vice President with Bailard and a member of the Foundation's board of directors. "This is just one more way we can action that commitment."

As part of the firm's commitment to values and impact, the five focus donation areas of the Bailard Foundation are financial literacy, affordable housing, homelessness, sponsorship of an impact-oriented prize, and international impact initiatives. The Foundation is pleased to announce that it has also made its first five impact donations.

**About Bailard Inc.**

With 50 years of experience, Bailard is an independent wealth and investment management firm that combines proven, proprietary methodologies with innovative new strategies to drive success for clients. For individuals and institutions alike, Bailard proudly serves as a trusted partner focused on achieving long-term results aligned with client values and goals. An independent firm since our founding in 1969, we stand committed to our values and, most importantly, our clients. With \$3.7 billion AUM as of June 30, 2019, Bailard's high-touch client service and proven track record are grounded in the firm's core values of accountability, compassion, courage, excellence, fairness, and independence. To learn more about Bailard, please visit: <https://www.bailard.com/>.

*\* 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.*