

## Firm Update 2012

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Last year was an exciting year for the firm and 2012 certainly includes initiatives that will benefit our clients as well as our Associates. On behalf of the entire DiMEO Schneider team, I want to thank our clients and friends for your loyalty and support.

### 2011 Highlights

- **Crossed the \$35 billion** mark in assets under advisement while growing all client segments including Retirement Plans, Nonprofit, Taft-Hartley and Wealthy Investors.
- **Added talented professionals** to our Institutional, Wealth Office™ and Research efforts and promoted several key contributors.
- Hosted our **3rd Annual Investor Conference** with a record 300+ attendees.
- Introduced our **new Performance Reporting** system which was enthusiastically received by clients.
- **Expanded our [CIOutsource™](#)** service for investors seeking discretionary management.
- **Expanded our Alternatives Research** effort to 12 professionals.

### 2012 Initiatives

- Just completed our **10–Year Capital Market Assumptions**
- **Releasing our 4<sup>th</sup> textbook** this February – Nonprofit Asset Management (Wiley)
- **Expanding Training and Education efforts** for clients and committees including more workshops, print and video resources.
- **Creating the role of Chief Operating Officer** and promoting our CFO, Scott Blim, to the position.
- Expanding our office space.
- Hosting **4<sup>th</sup> Annual Investor Conference on September 13** – Save the date!

Most important, we commit to providing clients with conflict-free and prudently progressive advice. Thank you, very best wishes and as always, please contact me or any of our professionals for assistance.

