

## Firm Profile: A Time-Tested Approach Informs Everything We Do

### ABOUT US

Founded nearly a century ago, 1919 Investment Counsel, LLC provides customized equity and fixed income strategies for institutions, family offices and high net worth individuals. Our roots date back to 1919 when Scudder Stevens & Clark, our predecessor firm, pioneered the Investment Counsel Industry.

Headquartered in Baltimore, Maryland, the firm managed approximately \$15.1 billion in assets as of December 31, 2019.

### OUR INVESTMENT APPROACH

The cornerstone of 1919 Investment Counsel's investment process is proprietary, fundamental research with an emphasis on high-quality companies, risk management and diversification. Our investment team of over 30 investment professionals averages over 30 years of experience with exposure to every market cycle. We offer an array of separately managed account solutions specifically tailored to our clients' unique needs.

### OUR INVESTMENT STRATEGIES

#### SRI/ESG Strategies

- SRI/ESG Equity
- SRI/ESG Fossil Free Equity
- SRI/ESG Catholic Values Equity
- SRI/ESG Balanced Equity
- SRI/ESG Full Duration Fixed Income
- SRI/ESG Intermediate Duration Fixed Income

#### Equity Strategies

- Quality Growth Equity
- Global Growth Equity-ADR Strategy

#### Fixed Income Strategies

- Taxable Full Duration Fixed Income
- Taxable Intermediate Duration Fixed Income
- Intermediate Municipal Fixed Income
- Intermediate Government/Credit Fixed Income

### 40 YEARS STRONG IN SRI

1919 Investment Counsel is an experienced socially responsible manager with a history that can be traced back to 1975. Our rich heritage of providing separately managed accounts tailored to our clients' specific SRI and ESG mandates, informs our rigorous, research-driven investment approach.

Utilizing a number of social guidelines including religious, employment practices and environmental criteria, our team constructs portfolios that meet the specific mission and investment mandates of the endowments, foundations, corporations, pensions and individuals we serve nationwide.

### WITH OFFICES IN

Baltimore • Birmingham • Cincinnati •  
New York • Philadelphia • San Francisco

### CONTACT US

908-573-5888

[1919strategies.com](http://1919strategies.com)

**1919**

Theodore Scudder founds predecessor firm Scudder, Stevens & Clark and pioneers the Investment Counsel Industry

**2004**

Legg Mason Investment Counsel formed from the acquisition of Scudder Private Investment Counsel and Legg Mason Trust

**2015**

Acquired Sterne Agee Family Office

Socially Responsible Investing Strategies inception

**1975**

The Firm changes its name to 1919 Investment Counsel, LLC

**2014**

Acquired Rand & Associates

**2018**