

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 \$19.5 billion in assets as of September 30, 2021.

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

Equity Strategies

- Quality Growth Equity
- Global Growth Equity-ADR
- Disruptive Innovation
- REIT

Fixed Income Strategies

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

45 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
Houston • New York • Philadelphia
San Francisco • Vero Beach

CONTACT US

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1919strategies.com

1919
Theodore Scudder founds predecessor firm Scudder, Stevens & Clark and pioneers the Investment Counsel Industry

Socially Responsive Investing Strategies inception
1975

2004
Legg Mason Investment Counsel formed from the acquisition of Scudder Private Investment Counsel and Legg Mason Trust

The Firm changes its name to 1919 Investment Counsel, LLC
2014

2015
Acquired Sterne Agee Family Office

Acquired Rand & Associates
2018