



## Our Firm

SouthCol provides fiduciary leadership and investment advisory services to mission-based institutions who seek to make a difference for others.

The unwavering disciplines of effective stewardship—fiduciary governance, prudent investment processes, and accountability—are at the center of our work.

As investors, we recognize that the true value of an investment portfolio is measured by its ability to fund, empower, and amplify a broader purpose.

## Our Guiding Principles

- We put clients first and in every way act in their best interests.
- We are mission collaborators, empowering others to make a positive impact in the world.
- We believe that disciplined processes are essential to effective stewardship.
- Measurement, accountability, and communication are essential for the long-term development and growth of stewardship goals.
- Investments should reflect institutional priorities and mission.