



Fort Washington
Investment Advisors, Inc.

A member of Western & Southern Financial Group

ORGANIZATIONAL HIGHLIGHTS

Signatory of:



Parent Company:



ABOUT W&SFG

- ▶ Fortune 500® Company.¹
- ▶ Anchor investor in all Fort Washington strategies.
- ▶ Access to the breadth of W&SFG's enterprise resources.



11-Time Winner
of P&I Best Places
to Work in Money
Management.³



ASSETS UNDER MANAGEMENT⁶

\$98.0 Billion
TOTAL AUM

\$31.5 Billion
THIRD-PARTY AUM

A LONG-TERM PARTNER TO ENDOWMENTS & FOUNDATIONS

Endowments, foundations, nonprofits, and charitable organizations play an important role in our communities, and Fort Washington has been a committed partner to clients in these spaces for more than 35 years. We understand that each organization has distinct objectives, responsibilities, and investment needs. By developing a clear understanding of each client's mission, long-term goals, risk tolerance, liquidity needs, and investment guidelines, we build an investment approach tailored to its unique circumstances.

Our investment professionals work closely with boards and investment committees to establish appropriate policies and guidelines and develop portfolios aligned with each organization's objectives and constraints. Our comprehensive capabilities include investment policy development, asset allocation, manager due diligence, portfolio management, performance measurement and monitoring, and regular portfolio reviews. Through disciplined investment and risk management, we provide ongoing guidance designed to help organizations meet current operational needs, preserve capital, and position portfolios for potential long-term growth.

ABOUT FORT WASHINGTON

Fort Washington Investment Advisors, Inc. (FW) is a registered investment advisor, founded in 1990,⁴ and the primary investment management subsidiary of Western & Southern Financial Group (W&SFG). We are a diversified asset management firm serving a broad range of institutional investors, including endowments, foundations, nonprofits, public retirement systems, corporations, and other organizations. Our investment capabilities span public and private markets and include customized solutions designed to address clients' distinct objectives and constraints.

18+ Years
Average Client
Relationship

Fort Washington / W&SFG | A Shared Commitment to Community

Our commitment to endowments, foundations, and nonprofits extends beyond investment management. Many of our associates are actively engaged with and serve on the boards of nonprofit organizations, giving us **firsthand perspective** on the goals, responsibilities, and challenges mission-driven organizations face. Together with W&SFG, we share a longstanding commitment to strengthening the communities where we live and work.



728
Organizations Supported⁵

\$37.5 Billion
Community Impact Since 2008



\$136 Million+
Economic impact on the
region, benefitting hundreds
of businesses



\$10.9 Million
Raised for cancer research in
Cincinnati since 2007



\$2 Million+
In support of
programs, care,
and conservation



\$1.2 Million
Donated in 2025



\$700,000+
Raised for local
foodbank in 2025

Representative Endowment & Foundation Relationships

Academy of American Franciscan History	Mt. St. Joseph University
Bayley Senior Care	Roger Bacon High School
Best Point Education and Behavioral Health	The Summit Country Day School
Cincinnati Art Museum	Thomas More University
Cincinnati Zoo & Botanical Garden	University of Cincinnati
CISE	Xavier Jesuit Academy
DePaul Cristo Rey	Xavier University
Franklin University	

INVESTMENT CAPABILITIES

Expertise Across Asset Classes

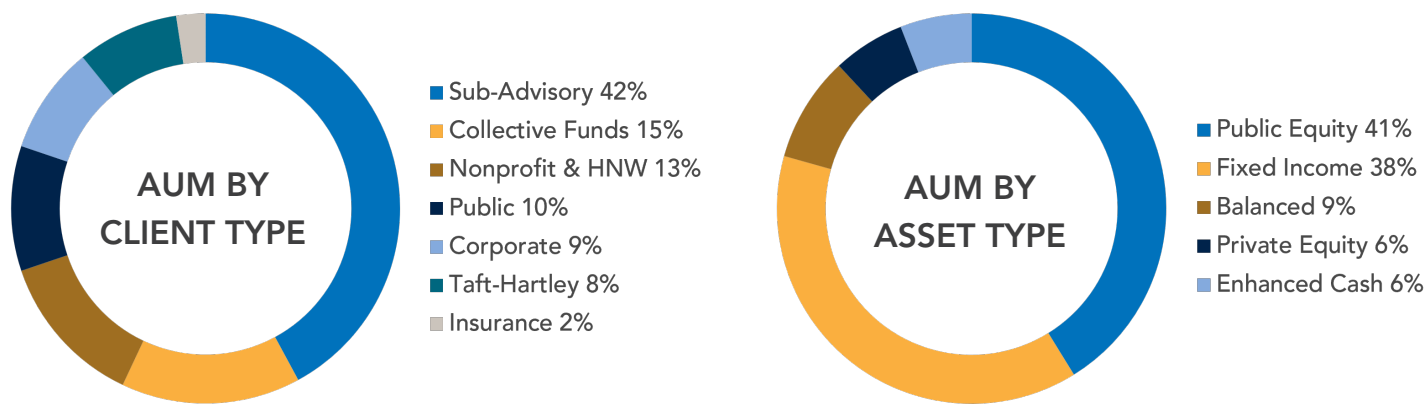
FIXED INCOME		PUBLIC EQUITY	
Corporates • Active Corporate • High Yield • Bank Loans	Securitized Products • Securitized Total Return • Securitized Opportunities • Ultra Short Duration	Large Cap • Dividend • Large Cap Focused • Large Cap Value	
Multi-Sector • Short Duration • Intermediate • Core • Core Plus • Strategic Income	Emerging Markets • Blended • Corporate	Small / Mid Cap • Small Company • SMID Cap Core	
	Other • Private/Direct Lending • Municipals • CLOs	Other • Focused • Midstream	
CUSTOMIZED SOLUTIONS		PRIVATE EQUITY	
• Multi-Strategy • Liquidity Management	• Insurance Solutions • LDI Solutions	• Diversified Funds of Funds • Secondary • Small Market Funds	

ASSETS UNDER MANAGEMENT

Fort Washington manages a total of **\$98.0 billion**, including **\$31.5 billion** for a variety of institutional investors and high-net-worth families.⁶

\$2.5 Billion
ENDOWMENTS & FOUNDATIONS

THIRD-PARTY ASSETS UNDER MANAGEMENT



Data is as of 06/30/2026.

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²The Equity Collective is a collaboration between 27 wealth and asset management firms dedicated to educating, empowering, and developing the next generation of diverse leaders in the industry.

³Best Places to Work rankings are determined in conjunction with third-party surveys of employers and employees.

⁴Registration as an investment advisor does not imply any level of skill or training.

⁵Categories of causes and needs supported in 2025 by Western & Southern's corporate foundation, associates, charitable fundraising campaigns and community sponsorships.

⁶Includes assets under management as of 06/30/2026 by Fort Washington Investment Advisors, Inc. of \$92.4 billion and \$5.6 billion in commitments managed by Fort Washington Capital Partners Group, a division.

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Receive concise, expert updates on markets, economic trends, and investment implications.

VISIT OUR WEBSITE

<https://www.westernsouthern.com/fortwashington>

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▼ **Uncompromised Focus®**