



**FOR IMMEDIATE RELEASE**

## **Syntrinsic Named an investor.com 2020 Top Charitable Financial Advisor Firm**

June 22, 2020—(DENVER)—The world and business as we know it has drastically changed in the last few months. Navigating these uncharted waters has been difficult for not only firms, but for the customers and organizations they serve.

“Syntrinsic is acutely aware of how the nonprofit sector has been hit particularly hard – with demand for additional services, shrinking donations in some cases, and having to cancel fundraising events – many nonprofit organizations are struggling during these uncertain times,” said Ben Valore-Caplan, founder and CEO.

“In August 2008, I started Syntrinsic as I could see the opportunity for a service-focused, deeply ethical investment management firm. I knew we could help those working hard to make their communities better, here in Colorado and beyond,” continued Valore-Caplan. “This has never been truer than today when everyone has been deeply impacted by the COVID crisis. We’re honored to work side-by-side with our clients, and to be recognized by investor.com as a 2020 Top Charitable Financial Advisor Firm for our work.”

Only 108 firms in the nation were named to the 2020 list and Syntrinsic is the only Colorado-based firm to be recognized.

To determine the 2020 Top Charitable Financial Advisor Firms, investor.com’s research team analyzed data from more than 7,000 RIAs and applied the following qualifiers:

- The firm must be trusted by investor.com according to the [Trust Algorithm](#).
- The firm must have a clean disciplinary history.
- The firm must have at least 10% or greater of their total client base with charitable organizations.
- The firm must have at least 10% or greater of their total assets under management (AUM) with charitable organizations.

"Our mission at [investor.com](#) is to be a trusted resource for Americans researching and comparing financial advisors," said Jessica Hoelscher, director of data and research at investor.com. "investor.com has a strong focus on consumer advocacy and because of this, we feel it is important to highlight and recognize firms that are committed to helping charitable organizations. Oftentimes, these acts of service are not brought to the forefront, and we are taking this opportunity to recognize Syntrinsic for going above and beyond for charitable organizations."

For more information on investor.com’s proprietary Trust Algorithm and vetting process, please visit <https://investor.com/trust-algorithm>.

*This recognition came from independent research conducted by investor.com and Syntrinsic did not apply or pay for this recognition.*

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**ABOUT SYNTRINSIC**

Founded in 2008, Syntrinsic serves as investment advisor and strategic partner to public and private foundations, public charities, independent schools, faith-based organizations, and mission-led private clients. To learn more about Syntrinsic, visit [www.syntrinsic.com](http://www.syntrinsic.com).

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