



Company Overview

Aris Corporation

Aris Corporation of America was established in 1974 by a group of Financial Advisors to provide their clients with financial solutions that were holistic and client-focused. In the beginning Aris developed retirement, and asset accounting geared to high income, high net-worth individuals, businesses and professional practices. In 1994 Aris began integrating wealth and trust services into their offerings. The offerings of Aris remain resilient and adaptive to market changes and opportunities over time. Aris today offers a multitude of client-focused retirement and investment solutions nationally.

Aris is headquartered in State College, PA home of one of the largest world class research universities, The Penn State University. Aris is large enough to offer world class investment management options while small enough to support clients with exceptionally personalized service. Aris' team of Portfolio Managers and Relationship Managers has a high concentration of credentialed investment and relationship management professionals working together to provide clients optimal solutions for their investment goals.

Aris' due diligence process and proprietary capital market assumptions allows investors the opportunity to capitalize on the "Best of Breed" managers within each market segment as chosen by Aris' investment research professionals. Aris then puts the chosen managers to work honoring the constraints of client's optimal asset allocation, personal tax considerations, and risk tolerance.

Why Choose Aris?

Aris currently offers traditional, strategic investment portfolios as well as income-oriented and personal values based asset allocation strategies. As an independent offering, Aris does not offer proprietary products and conducts in-house due diligence on a universe of investment options, allowing for the appropriate, diversified financial strategy to meet each client's needs. Aris dynamically manages and rebalances asset allocation models to reflect adjustments warranted by capital market conditions.

The core foundation of Aris' investment philosophy is based on managing risk. Aris quantitatively evaluates portfolio risk, taking into consideration the correlation of assets within the portfolio, including those that may be transferred into the portfolio from prior managers, in the case of Aris High Net Worth Portfolios.

Financial advisors require a complete range of investment strategies to satisfy the variety of unique objectives of their clients. Investment choices, flexibility and customization are crucial when constructing a portfolio that aims to achieve a unique goal. However, the solution is incomplete without the correct underlying financial strategy and cohesiveness of investment vehicles within a portfolio. To this end, Aris offers specialized, targeted strategies for clients whose goals may not fit with those of a traditionally- allocated portfolio. Aris' ability to offer client's customized tax-sensitive solutions is a distinguishing characteristic among other investment managers.

Complete Aris Service Offerings



Disclaimers:

Investing involves risk including the potential loss of principal. There is no guarantee that a diversified portfolio will outperform a non-diversified portfolio in any given market environment. No investment strategy, such as asset allocation, can guarantee a profit or protect against loss in periods of declining values. This information is not a solicitation for investment. For more complete information about the various investment solutions available and the fees and risks associated with them, please refer to the Aris Disclosure Brochure, which you can obtain from your financial advisor. Aris is a division of AssetMark, Inc. AssetMark, Inc. is an investment adviser registered with the Securities and Exchange Commission. ©2015 AssetMark, Inc. All rights reserved.