Hirtle, Callaghan & Co., registered in 1988, serves 34 state(s) with a licensed staff of 48 advisors. Hirtle, Callaghan & Co. manages $17.8 billion and provides investment advisory services for 2,381 clients (1:50 advisor/client ratio).

**Benefits**

- Firm does not have any felony convictions.
- Firm does not accept commissions for its investment advisory services.
- Firm is not a broker-dealer, nor is affiliated with one and must act as a fiduciary at all times.
- Firm has been federally registered for 33 years.
- Firm has $1B or more in assets under management.
- The firm's website is secure.
- Firm does not have any misdemeanor convictions.
- Firm does not have an attorney conflict.
- Firm does not receive soft dollar benefits.
- Firm provides mobile-friendly experience for their clients.

**Considerations**

- Firm or a related person serves as an underwriter or general or managing partner of some of the products they recommend and may be incentivized to sell those products over others.
- The firm, or a related person, trade securities for themselves that they also recommend to their clients.
- Firm may recommend proprietary investments and products that could generate larger commissions than other similar non-proprietary products.