

# Separately Managed Accounts

A 25-year track record of active investment strategies that perform. Available at your preferred custodian.

## The Burney Difference



Steady growth over decades from client net new assets, outpacing the markets



Nationally recognized by CNBC, Barrons, and Financial Times



Robust investment management platform with equity models, asset allocation & impressive GIPS performance

## At a Glance

- 50 year track record
- Longest standing RIA in Virginia
- 16 advisory team members with PhD, CFP®, or CFA
- \$3B in AUM
- GIPS compliant
- Pricing starts at 40bps

## US Equity Portfolio Models

### Size & Style Responsive (SSR) 1 & 2

Our flagship active all cap equity strategy that rotates allocations based on the size and style phase in favor. We have two strategy versions that allow advisors to customize to the client situation.

### SSR (High Turnover)

Our flagship strategy implemented with higher turnover in retirement accounts where capital gains are not a consideration.

### SSR (Enhanced Yield)

Our flagship portfolio framework with a minimum 3% yield mandate at the portfolio level.

### SSR (130-30 Long Short)

Highly tax efficient with potential for excess return through short exposure and gross leverage. Remains 100% net long to the market. This strategy uses our ETF BRNY for the 130% long and individual securities for 30% short.

### SSR (With ESG)

We condense the selection universe of our flagship strategy to securities that pass our ESG screen.

### Master Portfolio

Our founder Jack Burney's strategy that has been deployed since 1974. It follows a low turnover, value bias and emphasis on small caps.

*Advisory services are offered through the Burney Company, an investment advisor registered with the U.S. Securities & Exchange Commission. SEC registration does not constitute an endorsement of the firm by the Commission nor does it indicate that the advisor has attained a particular level of skill or ability.*

Get in Touch

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