BAS
BURNEY ADVISOR SERVICES

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
- $2.7B 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 (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 (High Turnover)

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

SSR (With ESG)

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

SSR (Enhanced Yield)

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

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.

Get in Touch

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