Fact Sheet

ALLODIUM
INVESTMENT CONSULTANTS

Key Facts

Founded: 2005
Employees: 12

Location

500 Washington Avenue South
Suite 4400
Minneapolis, MN 55415

Services

Allodium is a fee-only registered investment advisor providing investment advice to individual and institutional investors.

Fiduciary Standard

Our client relationships are defined by a fiduciary standard of care which demands that we always act in the best interests of our clients.

Allodium Name

Allodium represents the philosophical foundation of our firm's independent approach to investment advice, unrestricted by the conflicts of interest that plague the Wall Street banks and brokerage firms.

Leadership

David Bromelkamp,
Chief Executive Officer

Eric Hutchens,
President & Chief Investment Officer

CEFEX-Certified
NAPFA Member

Passionately Independent Advice

Company Overview

Independent and fee-only. Allodium is an employee-owned firm that was created to simplify and improve the financial lives of our clients. We aspire to be the best investment management consulting firm and we work in a professional environment that supports the delivery of high quality advice. Our financial advice is independent, comprehensive and disciplined. We believe the best advice is completely aligned with your objectives without any real or perceived conflicts of interest. As a fee-only firm, we provide objective investment advice that is not biased by the sale of commission-based investment products.

Evidence-Based Investment Philosophy

We believe markets work. Markets have the potential to reward investors for the capital that they supply.

Diversification is essential. Diversification by asset class provides some control over portfolio risk.

Investors beat speculators in the long run. Approaches that try to predict the future often prove to be costly and futile.

Focus on your plan. An evidence-based investment plan frees you to focus on other things. Let the markets work for you by crafting a well-diversified, low-cost portfolio backed by decades of research and experience.

Services

Wealth Management: investment management, comprehensive financial plan, annual review meeting and booklet, financial plan integration with your investment portfolio, tax advantaged investment strategies, financial and estate plan integration with your related entities and portfolios, family member education and collaboration with your other professional advisors.

Fiduciary Management: investment management, comprehensive fiduciary plan, annual review meeting and booklet, fiduciary plan integration with your investment portfolio, tax advantaged investment strategies, fiduciary plan integration with your related entities and portfolio, board and committee member education, collaborating with your other professional advisors.

Investment Management Consulting: comprehensive assessment of financial position, investment policy formation, asset allocation strategy and risk management, periodic portfolio rebalancing, socially responsible investing, and investment performance monitoring, reporting and evaluation.

Financial Planning: includes retirement planning, estate planning, tax planning, asset and income protection planning, education planning, cash flow planning, and philanthropic planning.

Fiduciary Consulting: includes spending policy development, investment policy development, fiduciary education, socially responsible investing (SRI), financial analysis, and fiduciary reviews and assessments.