



## **Georgia-based investment advisor moves HQ to Ponte Vedra**

June 21, 2019

Wildermuth Advisory LLC, an Alpharetta, GA-based investment advisor, announced Thursday that it has moved its company headquarters from to Ponte Vedra Beach.

In addition to the move, Wildermuth also announced a number of strategic hires designed to support and maintain the company's growth, recently highlighted by the Wildermuth Endowment Fund exceeding the \$150 million assets under management milestone, according to a statement from the company.

"Ponte Vedra Beach is well known for its thriving economy, especially within the financial services and tourism sectors," said Daniel Wildermuth CEO and Chief Investment Officer at Wildermuth Advisory. "In addition to being a region of high economic growth, we also expect the superb climate and high quality of life to be useful in attracting the industry's best and brightest as we continue to add talent and grow our organization."

The Wildermuth Endowment Fund seeks to provide long-term capital appreciation and income to investors by employing investment strategies and asset allocation policies followed by traditional endowment funds. The Fund is designed in attempt to provide a "turn-key" endowment strategy in a single offering.

Ryan Cummins CFA, portfolio analyst, will join Wildermuth from his previous role as a freelance investment and finance professional, where he served as an outsourced chief investment officer for various clients. He is a graduate of The College of Charleston with a bachelor's degree in accounting.

Shane B. Zona CFA, valuation analyst will join Wildermuth from his previous role as a Senior Consultant in Forensics, Litigation Support and Valuation Services for Dixon Hughes Goodman LLP. Shane earned his bachelor's degree in economics from Florida State University and his master's in business administration from the University of North Florida.