

Ultimus Receives Highest Scores in *Global Custodian's* Mutual Fund Administration Survey

For the fifth consecutive year, clients of Ultimus Fund Solutions validate firm's commitment to best-in-class service

CINCINNATI, OHIO – August 6, 2019 – [Ultimus Fund Solutions®](#) (Ultimus®), one of the largest independent providers of mutual fund servicing, is delighted to announce that it received the highest overall score in *Global Custodian's* Mutual Fund Administration Survey for the fifth year in a row. Based on survey results, Ultimus earned both the Market Outperformer and Category Outperformer accreditations for the fifth consecutive year. The survey results demonstrate that Ultimus places great importance on providing high-quality service to clients.

The annual Mutual Fund Administration Survey, produced by *Global Custodian* and administered by AON McLagan, recognizes mutual fund service providers which provide an exceptional level of service to fund manager clients. This year, fund managers evaluated current service providers in 14 different categories, such as client service, fund accounting, transfer agency, distribution support, reporting, compliance, and on-boarding. Ultimus received the highest overall average score, 6.83 out of 7.0, while realizing the highest score in 10 categories and the second-highest score in the remaining four categories.

"We're grateful to once again receive the top scores in this industry survey, and appreciate our clients' participation as well as the Ultimus team's ongoing commitment to outstanding service," said Gary Tenkman, CEO of Ultimus. "As we continue to grow the firm in both size and solutions, it is extremely important to us to have high-quality service at the core of our business culture. Looking to the future, we plan to continue making investments in our professionals and technology to allow us to maintain exceptional customer service as a driving force."

Clients of Ultimus shared general appreciative comments as part of the survey, which were reported by *Global Custodian*. These comments included:

- *"We are not only completely satisfied with our relationship with Ultimus, but genuinely grateful. We cannot imagine doing our work without the remarkable support they provide."*
- *"By far the best at client service year after year."*
- *"I have used most [service providers] over my 35-year career and Ultimus Fund Solutions is the BEST!"*

"We are humbled to learn that we received remarkable scores from our clients in this year's *Global Custodian* survey," said Bill Tomko, EVP and Director of Fund Servicing at Ultimus. "We continuously look for opportunities to add value where we can, and to earn our clients' trust, day in and day out. This is a long-term priority. Thankfully, the survey results reinforce our strength in service and value year after year."

Ultimus will illustrate this client-centric focus at its upcoming event, Vision 20/20. The agenda for this three-day Client Summit is designed to provide clients with valuable information and deeper industry knowledge to help enhance their business strategy as they look to the future.



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Tenkman added, “We put clients at the center of all that we do. To visually reflect that, we have recently updated our [brand and logo](#). Our updated logo, with an open-architecture pyramid, illustrates our strong heritage, accessibility, continued progress and contains a ‘U,’ demonstrating that ‘you,’ our clients, come first.”

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About Ultimus

Ultimus Fund Solutions provides a highly customized and comprehensive suite of fund administration services for investment advisers. Our high-quality services include integrated solutions that support the launching and servicing of mutual funds, hedge funds, ETFs, private equity funds, real estate funds, venture capital funds, variable annuity trusts, state-sponsored 529 plans plus the unique needs of pensions, endowments, and foundations.

Our offering comes with a deep commitment to excellence, achieved through investments in both talent and technology, with constant focus on maintaining our consultative approach and boutique service culture. Ultimus stands out as an award-winning, trusted business partner by helping investment advisers and fund families navigate and flourish in today’s increasingly sophisticated and dynamic industry landscape. Ultimus’ comprehensive service solutions are provided by seasoned teams of professionals with a wealth of financial servicing experience. For more information, visit www.ultimusfundsolutions.com.