

Innovest named a 'Best Place to Work' by *Pensions & Investments*

This is the ninth time in ten years that Innovest has claimed this award

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New York, NY (Dec. 11, 2023) – Innovest Portfolio Solutions won the 2023 Best Places to Work in Money Management awards announced by *Pensions & Investments* today.

Presented by Pensions & Investments, the global news source of money management and institutional investing, the 12th annual survey and recognition program is dedicated to identifying and recognizing the best employers in the money management industry.

The Innovest culture is defined by our mission of stewardship. We are not just an investment firm; we are thoughtful stewards responsible for our clients, professionals, and community. The most important component of the Innovest culture is the emphasis on hiring and developing high-character professionals who share the Innovest mission, core values, and bedrock principles. The Innovest character can be defined as “a calling to give” to our clients, our colleagues, and to the greater good. Our culture helps us attract and retain the best and brightest in the industry. This has allowed Innovest to establish a strong reputation as a great place to work.

“As their employees attest, the companies named to this year’s Best Places to Work list demonstrate a commitment to building and maintaining a strong workplace culture,” said *P&I* Executive Editor Julie Tatge. “Even as firms grappled with volatile markets and ongoing stresses from the pandemic, their employees said they felt strong support from their managers, enabling them to do their best work.”

“*Pensions & Investments* is proud to honor the Best Places to Work in Money Management for the 12th year. A strong workplace culture that supports talent, advocates progress and drives innovation is paramount to driving the best outcomes and these asset managers demonstrate that. Congratulations to the 2023 honorees for their commitment to employee well-being, attractive incentive structures and talent development that demonstrate how investing in your employees can elevate our industry to greater heights,” said *P&I* President and Publisher Nikki Pirrello.

“Innovest has created a culture of serving others and each other. From collaborating in teams to completing challenging projects, volunteering during the work week, or providing the flexibility to work from home. I appreciate how recruitment is a gradual process to ensure that those who work here are good people. I feel as though the organization's leaders are aware of and acknowledge the struggles we face. I understand that I work for a company with a culture of honesty, and I respect the company and its leaders immensely for that.” Anonymous response from a surveyed Innovest employee by *Pensions & Investments*.

Pensions & Investments partnered with Best Companies Group, a research firm specializing in identifying

great places to work, to conduct a two-part survey process of employers and their employees.

The first part consisted of evaluating each nominated company's workplace policies, practices, philosophy, systems, and demographics. This part of the process was worth approximately 25% of the total evaluation. The second part consisted of an employee survey to measure the employee experience. This part of the process was worth approximately 75% of the total evaluation. The combined scores determined the top companies.

For a complete list of the 2023 *Pensions & Investments'* Best Places to Work in Money Management winners and profiles of the top 100 firms across size categories, go to www.pionline.com/BPTW2023.

About Innovest Portfolio Solutions, LLC

Started in 1996, Innovest is a fee-only, 100% employee-owned investment consulting firm headquartered in Denver. Innovest helps our nonprofit, family, and retirement plan clients achieve their goals by providing custom investment solutions, fiduciary protection, and elevated and uncommon service.

A house divided cannot stand, as the timeless adage goes, most financial investment houses try to do exactly that. They serve more than one master. Innovest serves only our clients. We were founded on the very idea that our interests, and the interests of our clients are one. Because of this, employees rally around a central purpose of serving our clients and making them raving fans in the process. Employees are challenged to resist a careerist attitude and are evaluated on pulling others up. Teamwork is emphasized and co-workers are encouraged to take advantage of strengths instead of attempting to change weaknesses. Employees actively look to serve each other. Co-founders Richard Todd and Wendy Dominguez established a firm where employees are proud to work.

About Pensions & Investments

Pensions & Investments, owned by Crain Communications Inc., is the 50-year-old global news source of money management and institutional investing. *P&I* is written for executives at defined benefit and defined contribution retirement plans, endowments, foundations, and sovereign wealth funds, as well as those at investment management and other investment-related firms. *Pensions & Investments* provides timely and incisive coverage of events affecting the money management and retirement businesses. Visit us at www.pionline.com.



Undivided. Innovest is a trailblazer, a steward, and a true innovator in serving our clients from our offices in Colorado, California, and Arizona. A house divided cannot stand, as the adage goes. Nevertheless, most financial investment houses try to do exactly that. They serve more than one master. We serve only our clients. Our interests and the interests of our clients are one.

www.innovestinc.com | (303) 694-1900