

# MEASURING UP

Yanni Partners

310 Grant Street Pittsburgh, PA 15219-2302

## Yanni Partners 2001 Client Symposium

The Yanni Partners 2001 Client Symposium was held on Thursday, March 29, 2001, at the Pittsburgh Airport Marriott Hotel. The annual event, which is sponsored by Yanni Partners, drew 200 attendees. The event featured 14 informative presentations by leading experts from firms around

the country. Topics included investment issues, recent market trends and forecasts. In addition, symposium attendees had the opportunity to interact with investment managers and colleagues from other organizations, as well as earn continuing professional education credits.

**Limited supplies of presentation handouts are available. Please call 412-232-1000.**

## Yanni Partners Education Center For Pension Trustees And Officers

The Yanni Partners Education Center for Pension Trustees and Officers held its first seminar on Wednesday, April 11, 2001, in Pittsburgh. The instructional seminar, titled "What You Don't Know Can Hurt You," was designed exclusively for Pension Plan Trustees.

Frank Domeisen and Brian Maxwell of Yanni Partners presented "What to Know About Your Defined Benefit Plan/Defined Contribution Plan" and Jim Yanni of Yanni Partners presented "What Goes Up Must Come Down — What You Should Know About Your Plan's Investment Performance."

The featured speaker was Monte Tarbox, Executive Director of the AFL-CIO Center for Working Capital, Washington, DC. Mr. Tarbox delivered an informative presentation on the Responsibilities and Liabilities of a Pension Trustee.

The seminar concluded with the seminar presenters taking part in an open forum question and answer session.

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If you have any questions or comments concerning this issue of "Measuring Up," please contact:

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## Mark Your Calendars



Yanni Partners provides a full range of consulting services vital to the management of various portfolios. Our ultimate goal is to offer a basis for improved investment monitoring and performance.

Yanni Partners is registered as an investment advisor and as a NASD registered broker/dealer. Yanni Partners is also a member of the Securities Investors Protections Corporation (SIPC).



YANNI PARTNERS

DELIVERING THE PROMISE

IN THIS ISSUE

A new name, corporate identity and promise to our clients

# MEASURING UP

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Fiduciary Consulting Group  
Fiduciary Consulting Group  
Fiduciary Consulting Group  
Butcher Consulting Group  
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Yanni•Bilkey Investment Consulting  
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Yanni Partners  
Yanni Partners  
Yanni Partners

We have a new name, but our roots go back twenty-five years.

Over the years we have developed an investment consulting practice that has centered on integrity, independent thought and a superior product delivered to our clients.

At Yanni Partners, we focus our total enterprise on helping to deliver a standard of living for a fulfilling life for a Plan's pensioner, to make it possible for a healthcare organization to offer the necessary and critical care for its community, to enable a college or university to afford its students the opportunity for a quality education or to assist our non-profit clients in achieving their mission of enriching society. We are committed to the realization of these purposes and others for our clients.

started a small investment consulting practice in 1976; today, he remains an active Senior Consultant. Our practice has grown to serve 120 clients in 23 states. Yanni Partners has a staff of thirty-six professionals, six of whom have the Chartered Financial Analyst designation and six of whom are candidates for this designation.

Our name change honors our roots and exemplifies our commitment to our clients and our staff. Jim Yanni, our founder and current Chairman,

We have committed to partner with our staff to enrich their employment potential, offering education and guidance along their career continuum. Our intent is to present an experience at Yanni Partners, which is not a job but an ennobled journey through one's life.

Our practice has grown to serve 120 clients in 23 states.

Yanni Partners appreciates its staff, valuing people for who they are — their contribution to the firm and their potential. We endeavor to concentrate on and emphasize a person's talents, maximizing their innate abilities. In this way, a team of

dedicated individuals services our clients, which brings an optimal effort and a superlative result. In the true spirit of partnership, teamwork is the platform for fertilization of ideas through the collaboration and commitment to our clients.

A textbook definition of a client relationship is a partnership joining forces to optimize the client's fund performance within a tolerable risk parameter. However, Yanni Partners'

view of the client relationship is a partnering which goes beyond portfolio construction and investment management implementation. A client relationship goes to the core of helping the client realize its corporate mission. In that way, our relationship is complete and fulfilled.

The cornerstone of Yanni Partners' vision is our core value — integrity. It is our steadfast adherence to our moral

and ethical code. Our drive is to do the right thing for the common good. Our key to success is the welfare of a Plan's participants or the Community's well-being.

We want to be known by our excellence. Excellence of thought and of execution in serving our clients is what we strive for. Our goal is to consistently achieve the highest standards of performance. We do not and will not "cut corners" in delivering services. We do what we say we will do.

We strive to give an extraordinary contribution by going above and beyond what is expected. In placing others first, the natural extension is to deliver excellence. We take personal responsibility to initiate actions needed to help our clients achieve their mission, live their purpose, and fully realize their vision.

We actively explore and discover better ways of serving our clients. We continuously strive to broaden our scope of understanding our field of endeavor. We research and clarify concepts to better guide our clients through an astute and well-thought-out decision.

We at Yanni Partners strive to make a difference. We deliver the promise.

Our goal is to consistently achieve the highest standards of performance.

A client relationship goes to the core of helping the client realize its corporate mission.



YANNI PARTNERS

DELIVERING THE PROMISE

## MISSION

Provide Investment Consulting Expertise to Organizations

In Order for Them to Fulfill Their Mission

- Corporate ■ Endowment / Foundation
- Healthcare ■ Labor ■ Public ■ Religious

## CORE VALUES

- Integrity** ■ Do the right thing for the common good
- Excellence** ■ Achieve the highest possible standard
- Appreciation** ■ Value people for who they are, their contribution and potential
- Learning** ■ Finding better ways, creating better ways
- Make a Difference** ■ A significant contribution above and beyond
- Team** ■ Collaboration in the spirit of partnership
- Leadership** ■ Take responsibility to initiate action to achieve the firm's mission, live the purposes and see the vision