

Pensions & Investments

THE INTERNATIONAL NEWSPAPER OF MONEY MANAGEMENT

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**BEST
PLACES
TO WORK**

IN MONEY MANAGEMENT

★★★ **2020** ★★★

**FIRST TIME
WINNER**

MANAGERS WITH 20 TO 49 EMPLOYEES

Xponance

Philadelphia
AUM as of June 30:
 \$10.8 billion
Employees: 42
Years won: 2020

3 COOL THINGS:

- Pre-pandemic, sponsored holiday meals in the office at least twice a year, such as the Monday before Thanksgiving and around Christmas or Easter.

- Weekly company-wide meetings over

Zoom, which include the CEO and the president/COO. Team members have played Uno and Trivial Pursuit together virtually. They've also come together for a virtual cooking lesson.

- Recognition efforts include Employee of the Year award, with a monetary gift and/or travel valued at \$2,000.

EMPLOYEES SAY:

- "We are the result of the recent merging of two firms, so there are bound to be ripples. However, the firm management has done a good job in what can always be a difficult situation. It is definitely a fun and friendly environment."

- "We stay connected with each other weekly with a firmwide virtual call. We have implemented a monthly virtual game (at) lunchtime and a monthly virtual book club. We have actually grown closer as a firm during this pandemic."

- "The culture of the organization lends itself to a place where you feel you are a part. The special activities that are provided help you to appreciate the culture of Xponance because you are made to feel that you matter."



LUNCH WITH A SIDE OF HUMILITY: Xponance is a big backer of Philadelphia's Broad Street Ministry. Each quarter, team members feel privileged to serve lunch to the less fortunate in the city.

PROFILES WRITTEN BY SUZANNE COSGROVE, JUDITH CROWN, MEAGHAN OFFERMAN, TRILBE WYNNE and JULIE TATGE