

Pensions & Investments

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CRAIN COMMUNICATIONS

Pensions & Investments BEST PLACES TO WORK IN MONEY MANAGEMENT

★★ 2024 ★★

MULTIYEAR WINNER

2024



2023



2022



2021



2020

MEDIUM EMPLOYERS: 50 TO 99 EMPLOYEES

Canterbury Consulting

Headquarters: Newport Beach, Calif.

AUM: \$44.4 billion as of June 30

U.S. employees: 67

THREE COOL THINGS:

- Offers a profit-sharing contribution of 5% of an employee's annual salary, in addition to a 50% match for up to 2% of their contributions to their 401(k) plans. Also reimburses employees for expenses related to the Chartered Financial Analyst and Chartered Alternative Investment Analyst programs after one year of service.

- Promotes fun through annual events such as Canterbury Day, a chili cook-off, a hot wing contest and an off-site holiday party, in addition to weekly Tuesday bagel breakfasts and happy hours. Gives two half-days off during the summer to be used as beach days.

- Bolsters health and wellness through annual summer step challenge where employees participate in competitions over the course of four weeks. The top two winners of each week receive a \$100 gift card, and the top two winners of the whole period receive an additional day of paid time off.

EMPLOYEES SAY:

- "The culture of growth and acceptance rings true through the halls. The team is always open to communicating how they work on themselves so we can all learn from each other. Upper management is always open to chat and help open opportunities for employees to work on different projects or specific items of interest."

- "The individuals I work with are an enthusiastic group of hardworking talented people who are also a lot of fun. I enjoy that we have a hybrid work schedule and aren't pressured to come into the office on work-from-home days."

- "The company culture includes the events throughout the year, whether that's something as small as the potlucks or 'Office Olympics' or something bigger like Canterbury Day."

— Caryl Anne Francia



Canterbury Consulting team members smile after participating in the OC Marathon.