

Julian Hillery

Senior Vice President - Investments



Julian helps people protect and grow their wealth, whether they are families planning for the next generation or institutions managing their endowments. He believes in keeping things simple: investments should be understood, and relationships should be built on trust.

Before joining the firm, Julian managed a multi-billion-dollar endowment portfolio in Houston, bringing the careful, long-term thinking that institutional investing demands. But it was his earlier years in his family's shipping business that taught him his most valuable lessons: honor your core values, respect the wisdom of previous generations, and always communicate openly with everyone involved.

A New Orleans native and University of Richmond graduate, Julian holds both Chartered Financial Analyst (CFA) and Certified Public Accountant (CPA) certifications. When he's not working with clients, you'll find him coaching Little League baseball or volunteering with education initiatives like the Great Aspirations Scholarship Program (GRASP) and Cristo Rey Richmond High School.

Julian Hillery is registered with the Financial Industry Regulatory Authority (FINRA) to offer services to clients who reside in Indiana, North Carolina and Virginia.