



Empowering Investors Through Education

Our Mission

At Alpha Architect, we simplify ETF investing through education, empowering advisors with evidence-based investment strategies that deliver transparent, long-term value.

Empowering Investors Through Education

We were founded by PhDs who believe that informed advisors lead to informed clients. We equip advisors with transparent strategies and research-backed insights they can use — and explain. Because clarity builds confidence, and confidence builds trust.

Our Story

Founded in 2010
as quantitative
consultants

2012: Major growth
driven by strategic
investment from a
multi-billion-dollar
family office

2014: Launched
first ETF

2023: Managed over
\$6 billion in assets

Core Beliefs

We stand by:



Transparency
over black
boxes



Evidence-based
strategies over
market stories



Systematic
approaches, not
ad-hoc decisions



Win-Win
partnerships, avoiding
win-lose dynamics

Alpha Architect Companies Overview



Quantitative investment management firm.



1042 QRP

Specialized tax-efficient solutions for business owners.



Democratizing ETF creation and management.



ETFs

Offering highly differentiated factor ETFs.

Our Product Philosophy

Alpha Architect builds ETFs to solve a specific portfolio problem. Unlike typical ETF issuers that build products to minimize friction and boost market share, Alpha Architect focuses on maximizing client outcomes.

The firm follows four core principles:



Evidence-based:
Strategies must have economic or academic backing.



Transparent:
No black boxes – holdings and processes are clear.



Conviction-driven:
Concentrated portfolios reflect strong beliefs.



Investor-aligned:
The team invests in their own funds.

Why Our Platform is Unique

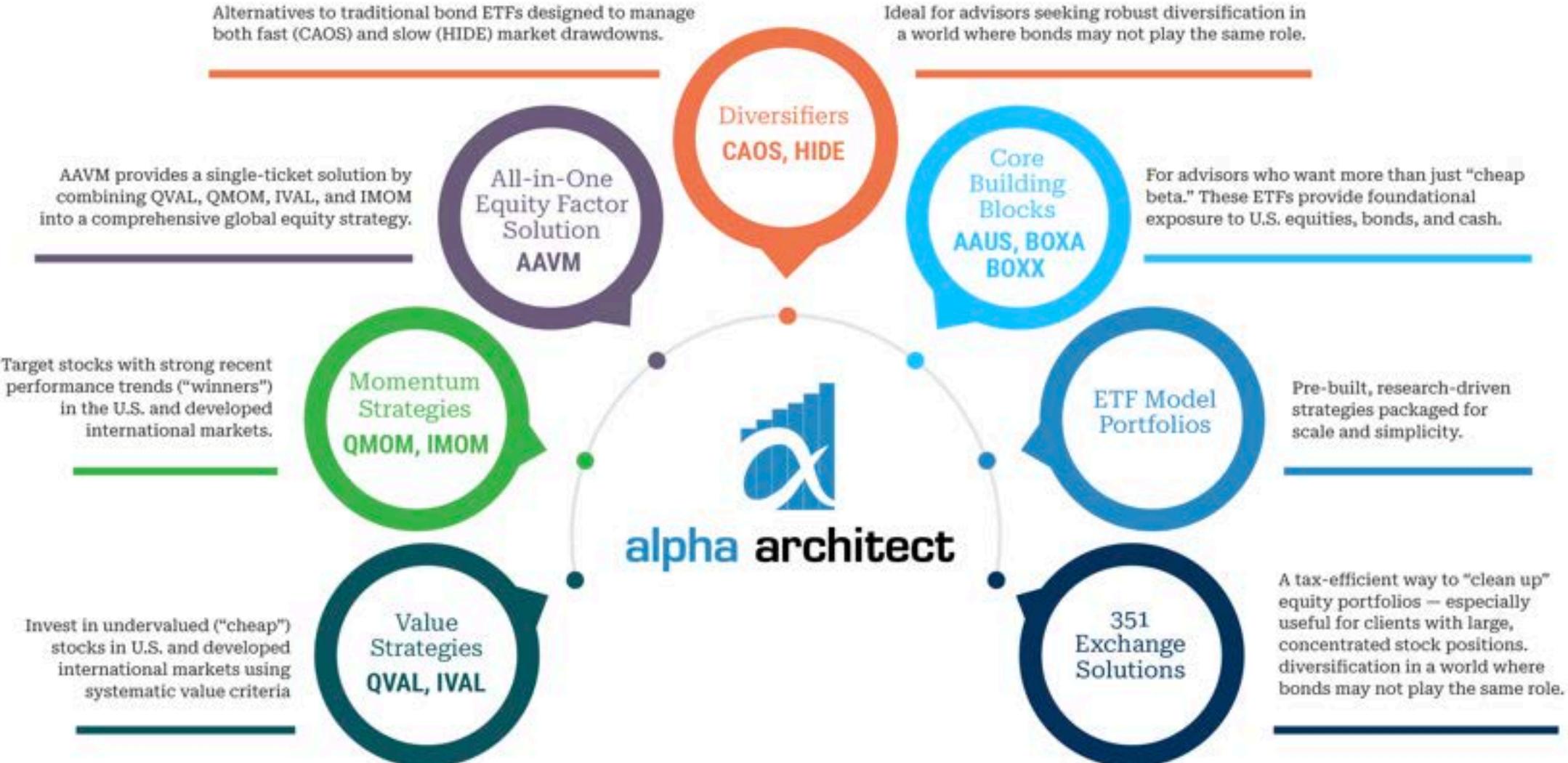
Different by Design

We design tools for advisors who think differently - complex, made accessible, backed by research, built for scale.

we build to solve problems not styleboxes

We're here to serve the people who value precision, independence, and intellectual honesty.

Product Portfolio: High-Level View



Stable. Scalable. Here for the long haul.

We're not building for headlines—we're building for legacy. Alpha Architect is designed to empower advisors, eliminate complexity, and stand the test of time.

-  **Advisor-Centric Tech** We're building tools that make it easier for advisors to serve clients and scale their practices—without adding operational burden or losing control.
-  **Evidence-Based Products** Every strategy starts with rigorous academic research and is pressure-tested in real markets. We don't follow trends—we publish them.
-  **Low Cost, High Integrity** We reduce unnecessary fees and friction. We don't chase commissions—we optimize portfolios. Aligned incentives, no nonsense.
-  **Community of Educators** Our mission to empower investors through education isn't a tagline—it's our foundation. We earn trust by teaching, not selling.

ETF Architect Platform

Making ETFs simple, scalable, and accessible.

ETF Architect simplifies the process of launching and managing ETFs through purpose-built technology, tax efficiency, and operational support—eliminating complexity for advisors.

We serve independent thinkers—RIAs who want to harness the power of the ETF structure to offer:



Lower costs



Streamlined operations



A simpler, more scalable solution for clients

Whether you're building a brand or scaling a strategy, our platform puts control back in the advisor's hands.

Alpha Architect 1042 QRP

Providing specialized investment strategies enabling business owners to defer capital gains taxes efficiently through Qualified Replacement Property solutions.

Leadership Team

Our leaders combine deep academic insights and disciplined operational expertise:



Wes Gray, CEO

Ph.D., University of Chicago, Marine Corps veteran



Jack Vogel, CFO

Ph.D., Drexel University



**Patrick Cleary, CEO
ETF Architect**

MBA Harvard,
Marine Corps veteran



**Ryan Kirlin,
President**

Fordham University

Our Culture (FASTER)

Rooted in military precision, our FASTER culture stands for:



Thought Leadership:

We actively publish research in respected journals and media outlets including:

WALL STREET
JOURNAL

Forbes

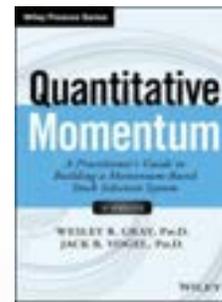


CFA Institute



Peer-reviewed
academic
journals

Books:



Industry Recognition:

Recognized for innovation and transparency in quantitative investment management.

BARRON'S

WALL STREET
JOURNAL

Forbes

Bloomberg
Business

FOX
BUSINESS

WHARTON
MAGAZINE

BUSINESS
INSIDER

Connect With Us:

Let's continue the conversation:

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Insights & Research Library



Alpha Architect Brochure

A snapshot of our mission, strategies, and ETF offerings. Perfect for quick reference or sharing with prospects.

https://funds.alphaarchitect.com/documents/factsheet_intro_to_alpha_architect/



Live Events & Webinars

Explore upcoming webinars, advisor workshops, and conference appearances to connect with our team.

<https://funds.alphaarchitect.com/events/>



Stay in the Loop

Sign up to receive event invites, ETF insights, and educational content from Alpha Architect.

<https://funds.alphaarchitect.com/commsopt-in/>



Alpha Architect Website

Learn more about our mission, philosophy, leadership, and firm history.

<https://alphaarchitect.com/>



ETF Strategy & Fund Center

Dive into detailed information about our ETF offerings, investment process, and fund performance.

<https://funds.alphaarchitect.com/>



Insights & Research Library

Access whitepapers, blog posts, and thought leadership to support advisor-client conversations.

<https://funds.alphaarchitect.com/content-library/>

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IMPORTANT RISK INFORMATION Investors should carefully consider the investment objectives, risk, charges, and expenses of the funds. This and other important information is in the indicated fund’s prospectus, which may be obtained by calling (215) 882-9983 visiting www.AlphaArchitect.com/funds.

The prospectus should be read carefully before investing. Investing involves risk, including loss of principal. The following risks are common to all ETFs mentioned: Investment risk. When you sell your Shares of the Fund, they could be worth less than what you paid for them. The Fund could lose money due to short-term interest rate market movements and over longer periods during continued interest rate market movements. Therefore, you may lose money by investing in the Fund.

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