

# The Skorina Letter

News, Interviews, Research for Institutional and Family Office Investors

## ● Retained Executive Search ●

We recruit chief investment officers and senior asset managers for endowments, foundations, family offices and institutional investment firms

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## Skorina's OCIO list 76 firms

September 2017 edition

(most firms as of 6-30-17)

<b>Agility (Perella Weinberg)</b> Chris Bittman, CIO	Denver, CO (303) 813-7910	<b>\$8bn</b> (5-31-17) <a href="mailto:cbittman@pwppartners.com">cbittman@pwppartners.com</a>
<b>Alan Biller and Associates</b> Alan D. Biller, CEO & Sr Consultant	Menlo Park, CA (650) 328-7283	<b>\$88bn</b> total <b>\$37.8bn</b> discretionary (6-30-17) <a href="mailto:alan@alanbiller.com">alan@alanbiller.com</a>
<b>Angeles Investment Advisors</b> Leslie B. Kautz, Principal Tatijana S. Janko, Director	Santa Monica, CA (310) 393-6300 (310) 463-7964	<b>\$26bn</b> advisory <b>\$3.0bn</b> discretionary (6/30/17) <a href="mailto:lkautz@angelesadvisors.com">lkautz@angelesadvisors.com</a> <a href="mailto:tjanko@angelesadvisors.com">tjanko@angelesadvisors.com</a>
<b>AON Hewitt</b> Steve Cummings, President	Chicago, IL (847) 442-0064	<b>\$104bn</b> discretionary (3-31-17) <a href="mailto:steve.cummings@aonhewitt.com">steve.cummings@aonhewitt.com</a>
<b>Appomattox Advisory</b> Drienne Benner, MD Institutional Marketing	New York, NY (212) 546-6247	<b>\$1.5bn</b> discretionary (5-31-17) <a href="mailto:dbenner@ainvadvisors.com">dbenner@ainvadvisors.com</a>
<b>Aptitude Investment Management</b> (ex Federal Way) Jeff Klein, CEO & Deputy CIO Michael Hillman, Head of IR	Seattle, WA (206) 788-8808	<b>\$5.6bn</b> total <b>\$5.3bn</b> discretionary (6-30-17) <a href="mailto:mhillman@aptitudeinvest.com">mhillman@aptitudeinvest.com</a>
<b>Artemis Wealth Advisors</b> Peter M. Rup, Founder & CIO	New York, NY (212) 838-9000	<b>\$825mm</b> total <b>\$625mm</b> discretionary (3-31-17) <a href="mailto:prup@artemiswa.com">prup@artemiswa.com</a>
<b>Arthur J. Gallagher &amp; Co.</b> Michael W. Johnson, Area President Institutional Investment & Fiduciary Services	Washington, DC (202) 898-2270	<b>\$53.6bn</b> advisory <b>\$2.6bn</b> discretionary (6-30-17) <a href="mailto:michael_w_johnson@ajg.com">michael_w_johnson@ajg.com</a>
<b>Athena Capital Advisors</b> Lisette Cooper, MP/CIO	Lincoln, MA (781) 274-9300	<b>\$5.498bn</b> total <b>\$4.884bn</b> discretionary (6/30/17)

		<a href="mailto:lcooper@athenacapital.com">lcooper@athenacapital.com</a>
<b>Balentine</b> M. Rob Ragsdale, Partner	Atlanta, GA (404) 537-4800	\$2.6bn (6-30-17) <a href="mailto:ragsdale@balentine.com">ragsdale@balentine.com</a>
<b>BlackRock</b> Edward Ng, MD, Head of US OCIO/LDI/Portfolio Mgmt	New York, NY (212) 810-5300	\$122bn discretionary (6/30/17) <a href="mailto:Edward.ng@blackrock.com">Edward.ng@blackrock.com</a>
<b>BNY Mellon Investment Management</b> Andrew D. Wozniak, Head of Fiduciary Management	New York, NY (412) 236-7940	\$9.5bn total \$8.2bn discretionary (6/30/17) <a href="mailto:andrew.wozniak@bnymellon.com">andrew.wozniak@bnymellon.com</a>
<b>Callan Associates</b> Jim Callahan, Executive VP	San Francisco, CA (415) 974-5060	\$2tn advisory \$24.1bn discretionary (6-30-17) <a href="mailto:callahan@callan.com">callahan@callan.com</a>
<b>Cambridge Associates</b> Deirdre Nectow, Mgn Director	Boston, MA (617) 457-1781	\$147.9bn advisory \$21.6bn discretionary (6-30-17) <a href="mailto:dnectow@cambridgeassociates.com">dnectow@cambridgeassociates.com</a>
<b>Canterbury Consulting</b> Poorvi Parekh, Director of Outsourced Investments	Newport Beach, CA (949) 718-2224	\$15.07bn advisory \$2.41bn discretionary (6-30-17) <a href="mailto:pparekh@canterburyconsulting.com">pparekh@canterburyconsulting.com</a>
<b>Clearbrook Global Advisors</b> Elliott Wislar, CEO Gregg Sibert, Chief Mrktg Officer	New York, NY (212) 683-6686	\$28bn advisory \$825mm discretionary (3-31-17) <a href="mailto:ewislar@clrbrk.com">ewislar@clrbrk.com</a> <a href="mailto:gsibert@clrbrk.com">gsibert@clrbrk.com</a>
<b>Commonfund</b> Tim Yates, Mgn Dir, Head Strategic Solutions	Wilton, CT (203) 563 -5254	\$24bn discretionary (6-30-17) <a href="mailto:tim.yates@commonfund.org">tim.yates@commonfund.org</a>
<b>CornerStone Partners</b> David Russell, Sr Mgn Dir	Charlottesville, VA (434) 295-3947	\$10bn (6-30-17) <a href="mailto:drussell@cstonellc.com">drussell@cstonellc.com</a>
<b>Covariance Capital Management (TIAA-CREF)</b> Cara Howe, Sr Dir bus dev Chris Carabell, MD, head of bus dev	Houston, TX (713) 770-2042  (713) 770-2072	\$2.4bn discretionary (6/30/17) <a href="mailto:chowe@covariancecapital.com">chowe@covariancecapital.com</a> <a href="mailto:ccarabell@covariancecapital.com">ccarabell@covariancecapital.com</a>
<b>DiMeo Schneider &amp; Assoc.</b> Robert (Bob) A. DiMeo, MD & Co-Founder Jon Fellows, Partner & Chair, Discretionary Committee	Chicago, IL (312) 853-1000	\$67.6bn advisory \$2.8bn discretionary (5-31-17) <a href="mailto:bdimeo@dimeoschneider.com">bdimeo@dimeoschneider.com</a> <a href="mailto:jfellows@dimeoschneider.com">jfellows@dimeoschneider.com</a>

<b>Disciplina</b> Matthew W. Wright, President & CIO	Nashville, TN (615) 490-6007	AUM not available <a href="mailto:mww@disciplina.com">mww@disciplina.com</a>
<b>Discretionary Management Services (DeMarche Assoc.)</b> Thomas C. Woolwine, President	Overland Park, KS (913) 981-1345	\$22.7bn advisory \$295mm discretionary (3-31-17) <a href="mailto:twoolwine@demarche.com">twoolwine@demarche.com</a>
<b>Edgehill Endowment Partners</b> Ellen Shuman, Mgn Partner Nina F. Scherago, Mgn Partner	New Haven, CT (203) 654-3552 (203) 654-3551	\$670mm discretionary (6-30-17) <a href="mailto:d.e.shuman@edgehillendowment.com">d.e.shuman@edgehillendowment.com</a> <a href="mailto:n.scherago@edgehillendowment.com">n.scherago@edgehillendowment.com</a>
<b>Fidelity Institutional Asset Management (ex Pyramis)</b> Jim Zadrozny, SVP institutional sales	Smithfield, RI (401) 292-4760 401-209-0523 cell	\$690bn global \$18bn discretionary (6-30-17) <a href="mailto:jim.zadrozny@pyramis.com">jim.zadrozny@pyramis.com</a>
<b>Fund Evaluation Group</b> Christina Drake, Sr Client Development Associate	Cincinnati, OH (513) 592-2107	\$54bn advisory \$6.9bn discretionary (6-30-17) <a href="mailto:cdrake@feg.com">cdrake@feg.com</a>
<b>Gerber Taylor</b> Matthew Kinnear, Client dev	Memphis, TN (901) 526-9750	\$7.8bn advisory \$5.3bn discretionary (6-30-17) <a href="mailto:mkinnear@gerbertaylor.com">mkinnear@gerbertaylor.com</a>
<b>Glenmede</b> Gordon Fowler, Jr., President, CEO & CIO	Philadelphia, PA (215) 419-6640	\$37.2bn total \$17.8bn institutional discretion (6-30-17) <a href="mailto:gordon.fowler@glenmede.com">gordon.fowler@glenmede.com</a>
<b>Global Endowment Mgmt</b> Stephanie Lynch, Partner	Charlotte, NC (704) 333-8282	\$8.4bn (6/30/17) <a href="mailto:slynch@globalendowment.com">slynch@globalendowment.com</a>
<b>Goldman Sachs</b> Kane Brenan, Mgn Director	New York, NY (212) 855-9851	\$126.4bn discretionary (6/30/17) <a href="mailto:kane.brenan@gs.com">kane.brenan@gs.com</a>
<b>Hall Capital Partners</b> Sarah Stein, Managing Partner Alison Bowe Diessner, Principal	San Francisco, CA (415) 277-2634 (415) 217-2494	\$31bn \$7.1bn discretionary (6-30-17) <a href="mailto:sstein@hallcapital.com">sstein@hallcapital.com</a> <a href="mailto:abowedieessner@hallcapital.com">abowedieessner@hallcapital.com</a>
<b>Highland Associates</b> Kelly Campbell, Mrktg Assoc	Birmingham, AL (205) 939-8307	\$22bn total \$10.5bn discretionary (6/30/17) <a href="mailto:kcampbell@highlandassoc.com">kcampbell@highlandassoc.com</a>
<b>HighVista</b> Andre Perold, CIO	Boston, MA (617) 406-6510	\$3.1bn discretionary (6-30-17) <a href="mailto:aperold@highvista.com">aperold@highvista.com</a>

<b>Hirtle Callaghan</b> Erica Evans, Head of Client Engagement	W. Conshohocken, PA (610) 943-4100	<b>\$23bn</b> (6-30-17) <a href="mailto:smcevoy@hirtlecallaghan.com">smcevoy@hirtlecallaghan.com</a>
<b>Investment Performance Services</b> David A. Russell, Sr Investment Strategist	Newtown, PA Savannah, GA (215) 867-2330	<b>\$39bn</b> advisory <b>\$10bn</b> discretionary (3-31-17) <a href="mailto:drussell@ips-net.com">drussell@ips-net.com</a>
<b>Investure</b> Ellen Meyer, Client Team Dir	Charlottesville, VA (434) 220-0280	<b>\$13.5bn</b> discretionary (7-31-17) <a href="mailto:emeyer@investure.com">emeyer@investure.com</a>
<b>J.P. Morgan Asset &amp; Wealth Management</b> Monica Issar, Head Endowments & Foundations Group	New York, NY (212) 464-2852	<b>\$2.6 trillion</b> <b>\$27.3bn</b> discretionary (6/30/17) <a href="mailto:monica.issar@jpmorgan.com">monica.issar@jpmorgan.com</a>
<b>Lowe, Brockenbrough &amp; Co. (Bespoke Strategies)</b> Christopher Dion, MD & CIO	Richmond, VA (804) 287-2744	<b>\$2.3bn</b> total <b>\$1.0bn</b> institutional discretion (6-30-17) <a href="mailto:cdion@lowebrockenbrough.com">cdion@lowebrockenbrough.com</a>
<b>Makena</b> Bill Miller, Partner & COO	Menlo Park, CA (650) 926-0510	<b>\$19bn</b> (6-30-17) <a href="mailto:bmiller@makenacap.com">bmiller@makenacap.com</a>
<b>Mangham Associates</b> Elizabeth Aycock, Director	Charlottesville, VA (434) 973-2223	<b>\$1.5bn</b> discretionary (6-30-17) <a href="mailto:elizabeth.aycock@manghamassociates.com">elizabeth.aycock@manghamassociates.com</a>
<b>Marquette Associates</b> Doug Oest, Mgn Partner	Chicago, IL (312) 527-5500	<b>\$156bn</b> advisory <b>\$6.9bn</b> discretionary (6-30-17) <a href="mailto:tburdick@marquetteassociates.com">tburdick@marquetteassociates.com</a>
<b>Meketa Fiduciary Mgmt</b> Chauncey Peebles, Relationship Manager	San Diego, CA (760) 795-3455	<b>\$550bn</b> advisory <b>\$6.4bn</b> discretionary (6-30-17) <a href="mailto:cpeebles@meketafm.com">cpeebles@meketafm.com</a>
<b>Mercer</b> Rich Joseph, US delegated solutions leader	Boston, MA (617) 747-9540	<b>\$10.2Trillion</b> advisory <b>\$191bn</b> delegated global AUM (6-30-17) <a href="mailto:rich.joseph@mercer.com">rich.joseph@mercer.com</a>
<b>Mill Creek Capital Advisors</b> Josh Gross, President	Conshohocken, PA (610) 941-7714	<b>\$5.6bn</b> total <b>\$5.1bn</b> discretionary (6/30/17) <a href="mailto:jgross@millcreekcap.com">jgross@millcreekcap.com</a>
<b>Morgan Creek Capital Mgmt</b> Mark Yusko, CEO & CIO	Chapel Hill, NC (919) 933-4004	<b>\$2.3bn</b> discretionary (6-30-17) <a href="mailto:myusko@morgancreekcap.com">myusko@morgancreekcap.com</a>
<b>Morgan Stanley/Graystone</b> Robert Mandel, Exec Dir	New York, NY (914) 225-5420	<b>\$23.2bn</b> OCIO discretionary (6-30-17) <a href="mailto:robert.j.mandel@morganstanley.com">robert.j.mandel@morganstanley.com</a>

<b>Suzanne Lindquist</b> , Exec Dir	(212) 296-1064	<a href="mailto:Suzanne.lindquist@morganstanley.com">Suzanne.lindquist@morganstanley.com</a>
<b>NEPC</b> <b>Steve F. Charlton</b> , Director consulting services	Boston, MA (617) 374-1300	<b>\$15.3bn</b> discretionary (6-30-17) <a href="mailto:scharlton@nepc.com">scharlton@nepc.com</a>
<b>New Providence Asset Mgmt</b> <b>Lance Odden</b> , Mgn Director	New York, NY (646) 292-1200	<b>\$3bn</b> discretionary (6-30-17) <a href="mailto:lance@newprov.com">lance@newprov.com</a>
<b>Northern Trust</b> <b>Margret Duvall</b> , Sr Solutions Strategist	Chicago, IL (312) 444-7336	<b>\$123bn</b> <b>\$64.9bn</b> discretionary (6-30-17) <a href="mailto:md64@ntrs.com">md64@ntrs.com</a>
<b>Partners Capital</b> <b>Paul Dimitruk</b> , Chair, Partner <b>Brendan Corcoran</b> , Partner	Boston, MA & UK (617) 292-2575 (617) 330-7679	<b>\$20.7bn</b> total (6-30-17) <a href="mailto:paul.dimitruk@partners-cap.com">paul.dimitruk@partners-cap.com</a> <a href="mailto:brendan.corcoran@partners-cap.com">brendan.corcoran@partners-cap.com</a>
<b>Pavilion Advisory Group Inc.</b> <b>/U.S. operations</b> (bought Slocum) <b>Deanna Allen</b> , VP Mrktg	Chicago, IL (312) 798-3200 Minneapolis, MN (612) 338-7020	<b>\$226bn</b> advisory <b>\$2.3bn</b> discretionary (12-31-16) <a href="mailto:dallen@pavilioncorp.com">dallen@pavilioncorp.com</a>
<b>Pentegra Investors Inc.</b> <b>Sarah Coxe Lange</b> , MD, Institutional Client Solutions	White Plains, NY (914) 821-9563	<b>\$11bn</b> total discretionary (6-30-17) <a href="mailto:sarah.lange@pentegra.com">sarah.lange@pentegra.com</a>
<b>Permanens Capital</b> <b>Gary Yannazzo</b> , CFO	New York, NY (212) 993-7440	<b>\$2.6bn</b> discretionary (6-30-17) <a href="mailto:gary@permcap.com">gary@permcap.com</a>
<b>PFM Asset Mgmt</b> <b>John Spagnola</b> , Mgn Dir	Philadelphia, PA (215) 567-6100	<b>\$8.7bn</b> advisory <b>\$9.4</b> discretionary (6-30-17) <a href="mailto:spagnolaj@pfm.com">spagnolaj@pfm.com</a>
<b>PNC Bank</b> <b>Deborah A. Kolsovsky</b> , EVP & MD Institutional Advisory Solutions	Scranton, PA (570) 961-6868	<b>\$22bn</b> discretionary AUM (6-30-17) <a href="mailto:deborah.kolsovsky@pnc.com">deborah.kolsovsky@pnc.com</a>
<b>Regions Asset Mgmt</b> <b>S. Alan McKnight, Jr.</b> , CIO	Birmingham, AL (205) 264-6621	<b>\$90.9</b> advisory <b>\$30.76bn</b> discretionary (6/30/17) <a href="mailto:alan.mcknight@regions.com">alan.mcknight@regions.com</a>
<b>Rocaton Investment Advisors</b> <b>John Hartman</b> , Mgn Director	Norwalk, CT (203) 621-1717	<b>\$532bn</b> advisory <b>\$10.2bn</b> discretionary (6-30-17) <a href="mailto:john.hartman@rocaton.com">john.hartman@rocaton.com</a>
<b>Rockefeller &amp; Co.</b> <b>Patricia Verrochi</b> , Mgn Dir	New York, NY (212) 549-5314	<b>\$26.4bn</b> total <b>\$10.9bn</b> discretionary (6/30/17) <a href="mailto:pverrochi@rockco.com">pverrochi@rockco.com</a>

<b>Roundtable Investment Partners</b> (merged with <b>Post Rock</b> ) <b>Geoffrey T. Boisi</b> , Chairman & CEO	New York, NY (212) 488-4700	<b>\$4.5bn</b> total (6-30-17) <a href="mailto:gboisi@roundtableip.com">gboisi@roundtableip.com</a>
<b>Russell Investments</b> <b>Eric Macy</b> , Mgn Dir	New York, NY (212) 702-7941	<b>\$2.3 trillion</b> advisory (12-31-16) <b>\$123.7bn</b> OCIO global institutional (3/31/17) <b>\$48.6bn</b> OCIO US institutional (3/31/17) <a href="mailto:emacy@russellinvestments.com">emacy@russellinvestments.com</a>
<b>Segal Marco Advisors</b> <b>Ryan M. Hanna</b> , SVP, Head Global Portfolio Solutions	Chicago, IL (312) 612-8469	<b>\$9.1bn</b> discretionary (6-30-17) <a href="mailto:rhanna@segalmarco.com">rhanna@segalmarco.com</a> Segal Marco Advisors
<b>SEI Institutional Group</b> <b>Michael Cagnina</b> , VP, MD	Oaks, PA (610) 676-1496	<b>\$88.5bn</b> discretionary (6/30/17) <a href="mailto:mcagnina@seic.com">mcagnina@seic.com</a>
<b>Seven Bridges Advisors</b> <b>M. Ram Lee</b> , Partner	New York, NY (212) 490-6320	<b>\$4.25bn</b> total (6-30-17) <a href="mailto:ramlee@sevenbridgesadvisors.com">ramlee@sevenbridgesadvisors.com</a>
<b>Spider Management Co.</b> <b>Rob Blandford</b> , President, CIO	Richmond, VA (804) 289-6010	<b>\$4.3bn</b> discretionary (6-30-17) <a href="mailto:rblandfo@richmond.edu">rblandfo@richmond.edu</a>
<b>Spruceview Capital Partners</b> <b>John A. Garibaldi</b> , Mgn Partner	New York, NY (212) 485-8617	AUM not available <a href="mailto:jgaribaldi@spruceviewpartners.com">jgaribaldi@spruceviewpartners.com</a>
<b>State Street Global Advisors</b> <b>Keith Malcher</b> , MD, Investment Solutions Group - OCIO	Stamford, CT (203) 708-2501	<b>\$83.9bn</b> discretionary (6/30/17) <a href="mailto:keith_malcher@ssga.com">keith_malcher@ssga.com</a>
<b>Strategic Investment Group</b> <b>Nikki Kraus</b> , MD, Client dev	Arlington, VA (703) 243-4433	<b>\$34.7bn</b> total <b>\$25.1bn</b> discretionary (6-30-17) <a href="mailto:nkraus@strategicgroup.com">nkraus@strategicgroup.com</a>
<b>Summit Solutions (Summit Strategies Group)</b> <b>Don Wehrmann</b> , Principal	Saint Louis, MO (314) 727-7211	<b>\$3.3bn</b> OCIO assets (5-31-17) <a href="mailto:dwehrmann@ssgstl.com">dwehrmann@ssgstl.com</a>
<b>SunTrust Bank</b> <b>Elizabeth Cabell Jennings</b> , SVP, Dir Institutional Investments Foundations, Endowments Specialty Practice	Atlanta, GA (404) 813-1538 Richmond, VA (804) 782-7016	<b>\$9.3bn</b> discretionary (6-30-17) <a href="mailto:Elizabeth.C.Jennings@SunTrust.com">Elizabeth.C.Jennings@SunTrust.com</a>
<b>The Investment Fund for Foundations (TIFF)</b> <b>Pat Torrey</b> , Mgn Director	Radnor, PA (610) 684-8201	<b>\$9.2bn</b> discretionary (6/30/17) <a href="mailto:ptorrey@tiff.org">ptorrey@tiff.org</a>

<b>UBS AG</b> Charles Service, MD, Investment Solutions	Chicago, IL (312) 525-7016	<b>\$13bn</b> OCIO mandates (6-30-17) <a href="mailto:charles.service@ubs.com">charles.service@ubs.com</a>
<b>US Trust Bank of America</b> Bernard Reidy, National Philanthropic Sales Executive	New York, NY (646) 855-5647	<b>\$30.9bn</b> discretionary (6-30-17) <a href="mailto:bernard.reidy@ustrust.com">bernard.reidy@ustrust.com</a>
<b>Vanguard</b> Kevin T. Justice, Principal	Malvern, PA (610) 669-6449	<b>\$36bn</b> discretionary (5-31-17) <a href="mailto:kevin_t_justice@vanguard.com">kevin_t_justice@vanguard.com</a>
<b>Verger Capital Management</b> Patrick Decker, Client Development, MD Wesley Carroccio, Client Development, Director	Winston-Salem, NC (336) 758-4129	<b>\$1.6bn</b> discretionary (6-30-17) <a href="mailto:pdecker@vergercapital.com">pdecker@vergercapital.com</a> <a href="mailto:wcarroccio@vergercapital.com">wcarroccio@vergercapital.com</a>
<b>Verus Investments</b> Shelly J. Heier, Pres & COO	Seattle, WA (206) 622-3700	<b>\$340bn</b> advisory <b>\$2.3bn</b> discretionary (6-30-17) <a href="mailto:sheier@verusinvestments.com">sheier@verusinvestments.com</a>
<b>Wells Fargo - Institutional Asset Advisors</b> Rob Kent, VP national sales dir	Overland Park, KS (913) 234-2929	<b>\$23.5bn</b> discretionary (3/31/17) <a href="mailto:robert.j.kent@wellsfargo.com">robert.j.kent@wellsfargo.com</a>
<b>Willis Towers Watson</b> Kemp Ross, Global Head of Delegated Debra Woida, Head, Delegated Investment Services, Americas Pieter Steyn, EMEA head Delegated Investment Services	Chicago, IL (312) 525-2436 (312) 525-2336 44 (0) 207 170 2714	<b>\$88bn</b> discretionary (6/30/17) <a href="mailto:kemp.ross@willistowerswatson.com">kemp.ross@willistowerswatson.com</a> <a href="mailto:debra.woida@willistowerswatson.com">debra.woida@willistowerswatson.com</a> <a href="mailto:pieter.steyn@willistowerswatson.com">pieter.steyn@willistowerswatson.com</a>
<b>Wilshire Associates</b> Kristofer T. Kelleher, Managing Director	Pittsburgh, PA (412) 434-1602	<b>\$940.4bn</b> advisory <b>\$7.9bn</b> discretionary (6/30/17) <a href="mailto:kkelleher@wilshire.com">kkelleher@wilshire.com</a>