

Outsource Chief Investment Officer (OCIO) Company Guide 2020

Charles Skorina & Company

<http://www.charlesskorina.com/>

Office: 520-529-5677

(AUM as of June 30, 2020 unless otherwise noted)

1. **Abbot Downing**, Minneapolis, MN

Douglas W. Evans, Head of Portfolio Managers

\$39.2bn Discretionary assets

\$44.4bn total

douglas.evans@abbotdowning.com

(415) 222-1490

2. **Agility**, Denver, CO

Chris Bittman, Partner

\$10.4bn Discretionary assets

cbittman@agilitycio.com

(303) 813-7910

3. **Alan Biller and Associates**, Menlo Park, CA

Alan D. Biller, Chairman

John Skjervem, CEO

\$51.1bn Discretionary assets

\$102.2.bn total

info@alanbiller.com

(650) 328-7283

4. **Alesco Advisors**, Pittsford, NY

Todd D. Green, Principal, Business Development & Client Service

\$4.1bn Discretionary assets (12-31-20)

\$4.9bn total

TGreen@alescoadvisors.com

(585) 749-0357

5. Angeles Investment Advisors, Santa Monica, CA

Michael A. Rosen, CIO & Managing Partner

Chaunce A. Peebles, Director

\$5.6bn Discretionary assets

\$28.4bn advisory

mrosen@angelesadvisors.com

chaunce@angelesinvestments.com

(310) 393-6300

6. AON, Chicago, IL

Ed Bardowski, Partner, Sales Leader

& Registered Principal

\$162.7bn Discretionary assets

\$3.1trillion advisory

ed.bardowski@aon.com

(484) 941-1409

7. Appomattox Advisory, New York, NY

Susan Webb, Founder, President, CIO

Oscar Gil, Founder, CEO

Drienne Benner, Managing Director Sales

\$1.7bn Discretionary assets

dbenner@ainvadvisors.com

(212) 895-3012

8. Arnerich Massena, Portland, OR

Ryland Moore, Principal, Director of Business Development

\$1.07bn Discretionary assets (9-30-20)

\$7.45bn total

rmoore@am-a.com

(503) 595-0247

9. Artemis Wealth Advisors, New York, NY

Peter M. Rup, Founder & CIO

Ron Zdrojeski, Director Business Development

\$862mm Discretionary assets

\$1.4bn total

prup@artemiswa.com

(212) 838-9000

10. Arthur J. Gallagher & Co., Washington, DC

Michael W. Johnson, Area President Institutional

Investment & Fiduciary Services

\$5.84bn Discretionary assets (3-31-20)

\$52.68bn advisory

michael_w_johnson@ajg.com
(202) 898-2270

11. Asset Strategy Consultants, Baltimore, MD

Alfred J. Morrison, Managing Principal

Andrew W. Conner, CIO

\$1.5bn Discretionary assets

morrison@assetstrategyconsultants.com

conner@assetstrategyconsultants.com

(410) 528-8282 x1043

(410) 528-8282 x1041

12. Ballentine Partners, Waltham, MA

Jayson DeAngelis, Partner

\$7.5bn Discretionary assets

\$15bn total

jdeangelis@ballentinepartners.com

(781) 314-1316

13. Bank of America, New York, NY

Bernard Reidy, Managing Director, National
Philanthropic Sales

\$30bn institutional Discretionary assets

\$279.2 total Discretionary assets

bernard.reidy@bofa.com

(203) 571-5341

14. BBR Partners, New York, NY

Todd Whitenack, Co-Managing Partner

\$16.4bn Discretionary assets (\$20.5) high touch

\$19bn total (11-30-20)

twhitenack@bbrpartners.com

(212) 313-9875

15. Beacon Pointe Advisors, Newport Beach, CA

Felix Lin, Partner, President Institutional

Consulting Services

Mike Breller, Managing Director, Sr. Consultant

\$11.8bn OCIO Discretionary assets

mbreller@beaconpointe.com

(949) 718-1602

16. BlackRock, New York, NY

Jeff Saef, Managing Director, Head Americas
& Client Portfolio Solutions

\$228bn global Discretionary assets
jeffrey.saef@blackrock.com
(609) 282-8950

17. Blue Edge Capital, Richmond, VA
Peter H. Bowles, Managing Director
\$450mm Discretionary assets
\$500mm total
pbowles@blueedgecap.com
(804) 673-7404

18. BNY Mellon, New York, NY
Jamie W. Lewin, Head of Investor Solutions
Andrew D. Wozniak, Head of Client Consulting
& Investor Solutions
\$18bn Discretionary assets
\$34bn total
jamie.lewin@bnymellon.com
andrew.wozniak@bnymellon.com
(212) 922-4524
(412) 236-7940

19. Brown Advisory, Baltimore, MD
Brigid Peterson, Head Endowment & Foundations
\$6.5bn OCIO Discretionary assets
\$49bn total Discretionary assetsary AUM
bpeterson@brownadvisory.com
(410) 537-5379

20. Brown Brothers Harriman, New York, NY
Tom Davis, Managing Director
\$4.6bn OCIO Discretionary assets
\$39.0bn total Discretionary assetsary AUM
thomas.davis@bbh.com
(212) 493-8699

21. Callan, San Francisco, CA
James A. Callahan, President
\$26bn Discretionary assets
\$2.5trillion advisory
callahan@callan.com
(415) 974-5060

22. Cambridge Associates, Boston, MA
Deirdre Nectow, Managing Director

\$36.2bn Discretionary assets
\$396.8bn advisory
dnectow@cambridgeassociates.com
(617) 457-1781

23. Canterbury Consulting, Newport Beach, CA
Robinson (Bob) Cluck, Chairman
Poorvi Parekh, Director OCIO
\$2.2bn Discretionary assets
\$23.6bn advisory
bcluck@canterburyconsulting.com
pparekh@canterburyconsulting.com
(949) 718-2224
(949) 718-2229

24. Clearbrook Global Advisors, New York, NY
Elliott Wislar, CEO
Gregg Sibert, Chief Marketing Officer
\$1.7bn Discretionary assets (3-30-20)
\$14bn advisory
ewislar@clrbk.com
gsibert@clrbk.com
(212) 683-6686

25. Commonfund, Wilton, CT
Mark Anson, President, CEO & CIO
Tim Yates, President, CEO & OCIO
\$11.25bn Discretionary assets
\$24bn total AUM
tim.yates@commonfund.org
(203) 563-5238

26. CornerCap Institutional, Atlanta, GA
Derek Tubbs, VP Institutional Development
\$1.3bn Discretionary assets
dtubbs@cornercap.com
(404) 870-0700

27. CornerStone Partners, Charlottesville, VA
(now part of Focus Financial Partners group Dec 2020)
David Russell, Sr. Managing Director
Christopher Laing, Sr. Managing Director
\$5.6bn Discretionary assets
\$9bn total
drussell@cstonellc.com

claing@cstonellc.com
(434) 293-7759

28. Crewcial Partners, New York, NY
(formerly Colonial Consulting)
Charlie Georgalas, Managing Director
\$927mm Discretionary assets
\$33bn advisory
ccg@crewcialpartners.com
(212) 218-4900

29. DeMarche, Merriam, KS
Thomas C. Woolwine, President & Vice Chairman,
\$336.6mm Discretionary assets (12-31-19)
\$25bn advisory
twoolwine@demarche.com
(913) 384-4994

30. Deutsche Bank, New York, NY
Brett Lane, Head of Institutional Advisory Services
\$14.93bn Discretionary assets (9-30-20)
\$6.74bn advisory
brett.lane@db.com
(212) 454-0816

31. Fiducient Advisors, Chicago, IL
(x DiMeo Schneider & Associates)
Robert (Bob) DiMeo, CEO
Jon Fellows, Partner & Chairman
Matt Porter, Partner & Vice-chairman Fiduciary
Investment Advisors
\$11.6bn Discretionary assets
\$184bn advisory
bdimeo@dimeoschneider.com
jfellows@dimeoschneider.com
mporter@dimeoschneider.com
(312) 853-1000
(773) 562-0849

32. Disciplina, Nashville, TN
Matthew W. Wright, President & CIO
\$400mm Discretionary assets
mww@disciplina.com
(615) 490-6007

33. Edgehill Endowment Partners, New Haven, CT

Nina F. Scherago, Managing Partner

Jason Raiti, Partner

Christin Sandweiss, Director Client Service

\$1.9bn Discretionary assets

n.scherago@edgehillendowment.com

j.raiti@edgehillendowment.com

c.sandweiss@edgehillendowment.com

(203) 654-3553

34. Ellwood Associates, Chicago, IL

Andrew Schwark, Director OCIO Consulting

\$1.1bn Discretionary assets (3-31-20)

\$63bn advisory

dan.simon@ellwoodassociates.com

(312) 782-5432

35. Evoke | ARIS, Los Angeles, CA

Brendan Corcoran, Senior Vice President

\$7.5bn discretion (3-31-21)

\$14bn advisory

BCorcoran@arisconsulting.com

(617) 233-0428

36. FEG Investment Advisors, Cincinnati, OH

Rebecca (Becky) S. Wood, President & CEO

Devinne C. Kelly, Sr. Client Development Associate

\$8.06bn Discretionary assets

\$64bn advisory

bwood@feg.com

dkelly@feg.com

(513) 827-3204

37. Fidelity Institutional Asset Management, Smithfield, RI

Jim Zadrozny, SVP Co-Head of Institutional Sales

\$35bn Discretionary assets (9-30-20)

\$1.03trillion global

jim.zadrozny@pyramis.com

(401) 292-4760

(401) 209-0523 cell

38. Fiduciary Trust Company, Boston, MA

Rick Tyson, Vice President & Investment Officer

\$7.1bn Discretionary assets

\$19bn total

tyson@fiduciary-trust.com

(617) 292-6799

39. Fiduciary Trust International, New York, NY

Ronald Sanchez, CIO

Kate Huntington, Head of Advisory Solutions Group

\$8.6bn OCIO advisory solutions (12-31-20)

\$32bn total

rsanchez@ftci.com

kate.huntington@fiduciarytrust.com

(877) 384-1111

40. Fiduciary Wealth Partners, Boston, MA

Preston McSwain, Managing Partner

\$1.1bn Discretionary assets (12-31-20)

\$2bn total

preston@fwp.partners

(617) 602-1901

41. F.L. Putnam Investment Management Company, Wellesley, MA

Chris McVey, Director of Business Development

\$3.7bn Discretionary assets

\$4.1 Billion Total assets

cmcvey@flputnam.com

(781) 591-8265

42. Gallagher Fiduciary Advisors, Washington, DC

Michael Johnson, President

Phil Sabrizio, Area Director

\$5.84bn Discretionary assets (3-31-20)

\$52.68bn advisory

michael_w_johnson@ajg.com

(202) 898-2270

43. Gerber Taylor, Memphis, TN

Charles Gerber, President

Matthew Kinnear, Client Development

\$5.4bn Discretionary assets

\$6.8bn advisory

cgerber@gerbertaylor.com

mkinnear@gerbertaylor.com

(901) 526-9750

44. Glenmede, Philadelphia, PA

Gordon Fowler, Jr., President, CEO, CIO

\$8.7bn tax-exempt OCIO
\$36.8bn total
gordon.fowler@glenmede.com
(215) 419-6640

45. Global Endowment Management, Charlotte, NC
Stephanie Lynch, Partner
\$10bn Discretionary assets (7-1-20)
slynch@globalendowment.com
(704) 333-8282

46. Global Strategic Investment Solutions, Scottsdale, AZ
Don Callaghan, Managing Partner
\$700mm Discretionary assets
dcallaghan@gsisus.com
(480) 935-2134

47. Goldman Sachs, New York, NY
Gregory Calnon, Managing Director
\$168bn Discretionary assets
gregory.calnon@gs.com
(212) 855-0124

48. Hall Capital Partners, San Francisco, CA
Sarah Stein, Managing Partner
Sarah Butler, Business Development Manager
\$12.3bn Discretionary assets
\$36.9bn total
sstein@hallcapital.com
sbutler@hallcapital.com
(415) 277-2634
(415) 217-2449

49. Highland Associates Birmingham, AL
(RIA owned by Regions Bank)
Trey Echols, CEO
Paige Daniel, Managing Director
\$8.8bn Discretionary assets
\$28.1bn total
pdaniel@highlandassoc.com
(205) 939-8308
(205) 939-8308

50. Hirtle Callaghan, W. Conshohocken, PA
Erica Evans, Head Client Engagement

\$17.8bn Discretionary assets
eevans@hirtlecallaghan.com
(610) 943-4100

51. Holt Capital Partners, Fort Worth, TX
Robert M. Holt, Jr., Managing Partner
\$280mm total
rholt@holtcap.com
(817) 877-1430

52. ICG Advisors, Los Angeles, CA
J. Jeffrey Assaf, Sr., Managing Director & CIO
\$564.98mm Discretionary assets
\$4.15bn advisory
jassaf@icgadvisors.com
(424) 270-8900

53. Investure, Charlottesville, VA
Bruce Miller, CEO
Puja Seam, COO
\$14.2bn Discretionary assets
bmiller@investure.com
pseam@investure.com
(434) 220-0280

54. Jasper Ridge Partners, Menlo Park, CA
Cori Duncan, CEO & Managing Partner
\$27.5bn Discretionary assets (12-31-20)
cduncan@jasperridge.com
(650) 494-4831

55. JPMorgan Asset & Wealth Management, New York, NY
Monica Issar, Global Head Multi-Asset
& Portfolio Solutions
\$63.3bn OCIO Discretionary assets
\$2.5trillion total
monica.issar@jpmorgan.com
(212) 464-2852

56. LCG Associates, Atlanta, GA
Lauren Moore, VP Marketing
Ed Johnson, President & CEO
\$891mm Discretionary assets
\$90bn advisory
lcangelosi@lcgassociates.com

ejohnson@lcgassociates.com

(770) 644-0100

57. Litman Gregory Asset Management, Walnut Creek, CA

(iM Global Partner)

Bill Thompson, Director, Endowments & Foundations Group, Senior Advisor

\$2.1bn Discretionary assets (12-31-20)

\$6.2 bn total

bill.thompson@lgam.com

(415) 464-5808

58. Lowe, Brockenbrough, Richmond, VA

Austin Brockenbrough III, Chairman

Christopher Dion, Managing Director & CIO

\$1.4bn Institutional Discretionary assets

\$3.1bn total

abiii@lowebrockenbrough.com

cdion@lowebrockenbrough.com

(804) 287-2744

59. Makena, Menlo Park, CA

Joseph Magher, Managing Director

\$20bn Discretionary assets

jmagher@makenacap.com

(650) 926-1339

60. Mangham Associates, Charlottesville, VA

Joel R. Mangham, Founder Co-CIO

Edward W. Karppi, Partner, Co-CIO

Joel Streeter, VP

\$1.6bn Discretionary assets

edward.karppi@manghamassociates.com

JoelP.Streeter@manghamassociates.com

(434) 973-2223

61. Marquette Associates, Chicago, IL

Brian Wrubel, President & CEO

Patrick McDowell, SVP, OCIO Services

\$8.9bn Discretionary assets

\$231.5bn advisory

bwrubel@marquetteassociates.com

pmcdowell@marquetteassociates.com

(312) 527-5500

62. Meketa Investment Group, San Diego, CA

Lisa Rubin, Director Marketing

\$17.4bn Discretionary assets

\$1.4 trillion advisory

lrubin@meketa.com

(760) 795-3450

63. Mercer, Boston, MA

Rich Joseph, US Delegated Solutions Leader

\$305.9bn delegated global

\$10.2trillion advisory

rich.joseph@mercer.com

(617) 747-9540

64. Mill Creek Capital Advisors, Conshohocken, PA

Josh Gross, CEO

\$6.2bn Discretionary assets

\$6.9bn total

jgross@millcreekcap.com

(610) 941-7714

65. Miller Investment Management, West Conshohocken, PA

Timothy P. Letter, Managing Director, business development

\$1.6bn Discretionary assets (12-31-19)

tletter@millerinv.com

(610) 834-9820 x136

66. Morgan Creek Capital Management, Chapel Hill, NC

Mark Yusko, CEO & CIO

\$1.6bn Discretionary assets (6-30-19)

myusko@morgancreekcap.com

(919) 933-4004

67. Morgan Stanley/Graystone, New York, NY

Robert Mandel, Managing Director

Suzanne Lindquist, Managing Director

\$35.6bn OCIO Discretionary assets

robert.j.mandel@morganstanley.com

suzanne.lindquist@morganstanley.com

(914) 225-5420

(212) 296-1064

68. Multilateral Endowment Management Company

“MEMCO”, Edmond, OK

Ryan S. Tidwell, CEO & CIO

\$1bn Discretionary assets

rtidwell@memco-invest.com

(405) 385-3146

69. NEPC, Boston, MA

Steve F. Charlton, Director Consulting Services

\$35.9bn Discretionary assets

\$1.09trillion advisory

scharlton@nepc.com

(617) 374-1300

70. New Providence Asset Management, New York, NY

Andrew Vogelstein, Chairman

Sarah Withers, Associate Director

\$2.4bn Discretionary assets

sarah@newprov.com

(646) 292-1272

71. Northern Trust, Chicago, IL

Lyndsay Ferencak, Director

Darius Gill, National Practice Director

\$88.7bn OCIO Discretionary assets

\$36.2bn advisory

LRF4@ntrs.com

DAG9@ntrs.com

(312) 444-3297

(312) 444-7153

72. Pacific Portfolio Consulting, Seattle, WA

Larry Hood, Founder & CEO

Kevin O'Connor, Managing Director Institutional Services

\$3.47bn total

larry@pacific-portfolio.com

koconnor@pacific-portfolio.com

(206) 623-6641

73. Partners Capital, Boston, MA & UK

Paul Dimitruk, Chairman, Partner

Leslie Ahlstrand, Principal

\$32.2.bn total

paul.dimitruk@partners-cap.com

leslie.ahlstrand@partners-cap.com

(617) 292-2575

(617) 778-7046

74. Pentegra Investors, White Plains, NY

Matthew P. Mintzer, EVP Sales & Marketing
\$15.7bn total Discretionary assets
matthew.mintzer@pentegra.com
(914) 821-9563

75. Permanens Capital, New York, NY
John Regan, Founding Partner
Alex Goldfarb, Partner
\$3.2bn Discretionary assets
alex@permcap.com
jr@permcap.com
(212) 993-7447

76. Permit Capital Advisors, W. Conshohocken, PA
Mimi Drake, Co-CEO
Bill Curran, Portfolio Manager
\$1.2bn Discretionary assets
mdrake@permitcapital.com
wcurran@permitcapital.com
(610) 940-5331

77. PFM Asset Management, Philadelphia, PA
John Spagnola, Managing Director
Jim Link, Managing Director
\$13.7bn Discretionary assets
\$6.7bn advisory
spagnolaj@pfm.com
linkj@pfm.com
(215) 557-6700

78. PNC Bank, Scranton, PA
Deborah A. Kolsovsky, EVP & Managing Director
OCIO & Retirement Solutions
\$26.87bn Discretionary assets
deborah.kolsovsky@pnc.com
(570) 961-6868

79. Prime Buchholz & Associates, Portsmouth, NH
William F. McCarron, President
\$3bn Discretionary assets
\$50bn advisory
bmc@primebuchholz.com
(603) 433-1143

80. Regions Asset Management, Birmingham, AL

S. Alan McKnight, Jr., CIO
\$41bn Discretionary assets
alan.mcknight@regions.com
(404) 979-5418

81. RiskBridge Advisors, New Canaan, CT
Christopher A. Reynolds, Director Institutional Sales
\$200mm Discretionary assets (3-31-21)
creynolds@riskbridgeadvisors.com
(770) 299-3832

82. Rockefeller Capital Management, New York, NY
Grace Yoon, Managing Director
\$15.8bn Discretionary assets (6-30-19)
\$34.8bn total
gyoon@rockco.com
(212) 549-5100

83. Russell Investments, New York, NY
Eric Macy, Managing Director
\$234.7bn Discretionary assets
emacy@russellinvestments.com
(212) 702-7941

84. SECOR Asset Management, New York, London
Kam Chang, Principal
\$28bn Discretionary assets (3-31-21)
\$44.6bn total
kam@secor-am.com
(212) 980-7365

85. Segal Marco Advisors, Chicago, IL
TJ Kistner, VP, Head of Discretionary assets Portfolio Management & Solutions
\$11.2bn Discretionary assets
tkistner@segalmarco.com
(312) 612-8493

86. SEI Institutional Group, Oaks, PA
Michael Cagnina, SVP, Managing Director
\$181bn Discretionary assets
mcagnina@seic.com
(610) 676-1496

87. Sellwood Consulting, Portland, OR
Ashlee Moehring, Consultant,

Principal, Chief Compliance Officer
\$542mm Discretionary assets
\$6.4bn total
ashleemoehring@sellwoodconsulting.com
(503) 596-2885

88. Seven Bridges Advisors, New York, NY
M. Ram Lee, Partner
\$5.4bn total
ramlee@sevenbridgesadvisors.com
(212) 490-6320

89. Silvercrest Asset Management, New York, NY
Chris Long, Managing Director
\$17.3bn Discretionary assets
\$23.8bn total
clong@silvercrestgroup.com
(212) 649-0697

90. Spider Management Company, Richmond, VA
Tory Sprehe, Director of Investor Relations
\$5.1bn Discretionary assets (3-1-21)
rblandfo@richmond.edu
(804) 289-6010

91. State Street Global Advisors, Stamford, CT
Gary Sems, VP, Global Fiduciary Solutions
\$145.6bn Discretionary assets
gary_sems@ssga.com
(203) 326-4255

92. Strategic Investment Group, Arlington, VA
Nikki Kraus, Managing Director Client Development
\$25.9bn Discretionary assets
\$26.4bn total AUM
nkraus@strategicgroup.com
(703) 243-4433

93. TIFF Investment Management, Radnor, PA
Kane Brenan, CEO
Rob Zion, COO
Pat Torrey, Managing Director
\$7bn Discretionary assets
ptorrey@tiff.org
(610) 684-8201

94. Truist Bank (x SunTrust), Atlanta, GA
Elizabeth Cabell Jennings, SVP, Director Institutional Investment E&F Practice
\$14.6bn Discretionary assets
Elizabeth.C.Jennings@SunTrust.com
(404) 813-1538

95. Truvvo Partners, New York, NY
Casey D. Whalen, CEO & CIO
Ilka Gregory, Director Client Relations
\$3bn total
cwhalen@truvvo.com
(212) 488-5485

96. UBS AG, Chicago, IL
Andrea Fisher, Head Specialist, Americas
Mohammad Ahmad, Head, Business Development
Calvin Kim, Director Investment Solutions Specialist Asia Pacific (ex. Japan/Australia)
\$15.6bn OCIO Discretionary assets
(\$16.1bn as of 9-30-20)
andrea.fisher@ubs.com
mohammad.ahmad@ubs.com
calvin.kim@ubs.com
(212) 882-5147
41 79 629 48 29

97. Vanguard, Malvern, PA
Christopher Philips, Head Institutional Advisory Services
\$57bn Discretionary assets
christopher_philips@vanguard.com
(610) 503-1089

98. VELA Investment Management, New Albany, OH
Ric Dillon, CEO
\$130mm Discretionary assets (12-31-20)
rdillon@vela-im.com
(614) 653-8352

99. Verger Capital Management, Winston-Salem, NC
Jim Dunn, CEO
Patrick Decker, Managing Director
Wesley Carroccio, Managing Director
\$1.7bn Discretionary assets
jdunn@vergercapital.com
pdecker@vergercapital.com

wcarroccio@vergercapital.com
(336) 934-4101

100. Verus Investments, Seattle, WA
Shelly J. Heier, President & COO
\$4.04bn Discretionary assets
\$433.9bn advisory
sheier@verusinvestments.com
(206) 622-3700

101. Wealth Strategist Partners, Chicago, IL
Susan K. Lucas, COO
\$1bn total
susan@wspcio.com
(312) 863-6082

102. Wells Fargo Institutional Asset Advisors, Glenbrook, NY
(Acquired by Principal Financial Group)
Dan Oldani, SVP
\$32bn Discretionary assets
daniel.d.oldani@wellsfargo.com
(833) 290-4678

103. Wespath II, Glenview, IL
T. Joseph Halwax, Managing Director Institutional Services
\$3.8bn Discretionary assets
jhalwax@wespath.org
(847) 866-4307

104. Willis Towers Watson, Chicago, IL
Kemp Ross, Global Head of Delegated
Clint Cary, Head, Delegated Investment Services, Americas
Pieter Steyn, EMEA Head Delegated Investment Services
\$148bn Discretionary assets
kemp.ross@willistowerswatson.com
clint.cary@willistowerswatson.com
pieter.steyn@willistowerswatson.com
(312) 525-2436
(312) 525-2406
44 (0) 207 170 2714

105. Wilshire Associates, Pittsburgh, PA
Phillip Enochs, Managing Director, Head Institutional Business Development
\$73.4bn Discretionary assets
\$1.1trillion advisory

Penochs@wilshire.com
(312) 762-5506

106. Worth Venture Partners, New York, NY
David Wertentheil, Partner
\$300mm Discretionary assets
dwertentheil@worthventure.com
(212) 558-9017

106 Firms - Total AUM - \$2.84 Trillion