

Outsource Chief Investment Officer (OCIO) Company Guide 2021

Charles Skorina & Company

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

Office: 520-529-5677

(AUM as of March 31, 2021 unless otherwise noted)

1. **Abbot Downing (Wells Fargo)**, Minneapolis, MN

\$41.5bn Discretionary assets

\$46.6bn total

Douglas W. Evans, Head of Portfolio Managers

douglas.evans@abbotdowning.com

(415) 222-1490

2. **Agility**, Denver, CO

\$12.1bn Discretionary assets

Chris Bittman, Partner

cbittman@agilitycio.com

(303) 813-7910

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

\$64.9bn Discretionary assets

\$102.2.bn total

Alan D. Biller, Chairman

John Skjervem, CEO

info@alanbiller.com

(650) 328-7283

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

\$4.33bn Discretionary assets

\$4.9bn total

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

TGreen@alescoadvisors.com

(585) 749-0357

5. **Angeles Investment Advisors**, Santa Monica, CA

\$7bn Discretionary assets

\$34.8bn advisory

Michael A. Rosen, CIO & Managing Partner

mrosen@angelesadvisors.com

Chaunce A. Peebles, Director

chaunce@angelesinvestments.com

(310) 393-6300

6. AON, Chicago, IL

\$203.4bn Discretionary assets

\$3.1 trillion advisory

Ed Bardowski, CSCP, Partner, Sales Leader

& Registered Principal

ed.bardowski@aon.com

(484) 941-1409

7. Appomattox Advisory, New York, NY

\$1.7bn Discretionary and non-discretionary assets

Susan Webb, Founder, President, CIO

Oscar Gil, Founder, CEO

Drianne Benner, Managing Director Sales

dbenner@ainvadvisors.com

(212) 895-3012

8. Arnerich Massena, Portland, OR

\$1.26bn Discretionary assets

\$3.5bn total

Ryland Moore, Managing Principal, Business Development

rmoore@am-a.com

(971) 263-7860 dir

(503) 239-0475 x147

9. Artemis Wealth Advisors, New York, NY

\$1.534bn Discretionary assets

\$1.722bn total

Peter M. Rup, Founder & CIO

prup@artemiswa.com

Ron Zdrojeski, Director Business Development

(212) 838-9000

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

\$6.03bn Discretionary assets

\$69.19bn advisory

Michael W. Johnson, Area President Institutional

Investment & Fiduciary Services

michael_w_johnson@ajg.com
(202) 898-2270

11. Asset Strategy Consultants, Baltimore, MD

\$2.1bn Discretionary assets

Alfred J. Morrison, Managing Principal

morrison@assetstrategyconsultants.com

(410) 528-8282 x1043

Andrew W. Conner, CIO

conner@assetstrategyconsultants.com

(410) 528-8282 x1041

12. Ballentine Partners, Waltham, MA

\$9.1bn Discretionary assets

\$17.7bn total

Jayson DeAngelis, Partner

jdeangelis@ballentinepartners.com

(781) 314-1316

13. Bank of America, New York, NY

\$35.3bn institutional Discretionary assets

\$324.8 total Discretionary assets

Bernard Reidy, Managing Director, National
Endowment and Foundations Executive

bernard.reidy@bofa.com

(203) 571-5341

14. BBR Partners, New York, NY

\$18.5bn Discretionary assets

\$20.8bn total

Todd Whitenack, Co-Managing Partner

twhitenack@bbrpartners.com

(212) 313-9875

15. Beacon Pointe Advisors, Newport Beach, CA

\$15.8bn OCIO Discretionary assets

\$19.8bn total

Felix Lin, Partner, President Institutional Consulting Services

Mike Breller, Managing Director, Sr. Consultant

mbreller@beaconpointe.com

(949) 718-1602

(949) 718-1600 Newport Beach main

16. BlackRock, New York, NY

\$246bn global Discretionary assets

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

jeffrey.saef@blackrock.com

(609) 282-8950

17. Blue Edge Capital, Richmond, VA

\$475mm Discretionary assets

\$500mm total

Peter H. Bowles, Managing Director

pbowles@blueedgecap.com

(804) 673-7404

18. BNY Mellon, New York, NY

\$16.6bn Discretionary assets

\$34bn total

Jamie W. Lewin, Head of Investor Solutions

jamie.lewin@bnymellon.com

(212) 922-4524

Andrew D. Wozniak, Head of Client Consulting
& Investor Solutions

andrew.wozniak@bnymellon.com

(412) 236-7940

19. Brown Advisory, Baltimore, MD

\$7.6bn OCIO Discretionary assets

\$59bn total Discretionary assets AUM

Brigid Peterson, Head Endowment & Foundations

bpeterson@brownadvisory.com

(410) 537-5379

20. Brown Brothers Harriman, New York, NY

\$47.7bn Total discretionary assets

Tom Davis, Managing Director

thomas.davis@bbh.com

(212) 493-8699

21. Callan, San Francisco, CA

\$28bn Discretionary assets

\$2.5trillion advisory

James A. Callahan, President

callahan@callan.com

(415) 974-5060

22. Cambridge Associates, Boston, MA

\$47.3bn Discretionary assets

\$529bn advisory
Deirdre Nectow, Managing Director
dnectow@cambridgeassociates.com
(617) 457-1781

23. **Canterbury Consulting**, Newport Beach, CA
\$3.1bn Discretionary assets
\$24.8bn advisory
Robinson (Bob) Cluck, Chairman
bcluck@canterburyconsulting.com
(949) 718-2229
Poorvi Parekh, Director OCIO
pparekh@canterburyconsulting.com
(949) 718-2224

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

25. **Commonfund**, Wilton, CT
\$12.9bn Discretionary OCIO assets
\$26.5bn total AUM
Mark Anson, President, CEO & CIO
Tim Yates, President, CEO & OCIO
tim.yates@commonfund.org
(203) 563-5238

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

27. **CornerStone Partners (Focus Financial)**, Charlottesville, VA
\$8.64bn Discretionary assets
\$10.04bn total
David Russell, Sr. Managing Director
drussell@cstonellc.com
Christopher Laing, Sr. Managing Director
claing@cstonellc.com

(434) 293-7759

28. Crewcial Partners, New York, NY

\$1.3bn Discretionary assets

\$36bn advisory

Charlie Georgalas, Managing Director

cgc@crewcialpartners.com

(212) 218-4900

29. DeMarche, Merriam, KS

\$1.25bn Discretionary assets

\$20.1bn advisory

Thomas C. Woolwine, Vice Chairman,

twoolwine@demarche.com

(913) 384-4994

30. Deutsche Bank, New York, NY

\$14.93bn Discretionary assets (9-30-20)

\$6.74bn advisory

Brett Lane, Head of Institutional Advisory Services

brett.lane@db.com

(212) 454-0816

31. Disciplina, Nashville, TN

\$1.5bn Discretionary assets

Matthew W. Wright, President & CIO

mww@disciplina.com

(615) 490-6007

32. Edgehill Endowment Partners, New Haven, CT

\$2.2bn Discretionary assets

Nina F. Scherago, Co-Founder and Managing Partner

n.scherago@edgehillendowment.com

Jason Raiti, Partner

j.raiti@edgehillendowment.com

Christin Sandweiss, Director Client Service

c.sandweiss@edgehillendowment.com

(203) 654-3553

33. Ellwood Associates, Chicago, IL

\$1.5bn Discretionary assets

\$82.7bn advisory

Andrew Schwark, Director OCIO Consulting

andy.schwark@ellwoodassociates.com

(312) 782-5432

34. Evoke | ARIS, Los Angeles, CA
\$7.5bn discretion
\$14bn advisory
Brendan Corcoran, Senior Vice President
BCorcoran@arisconsulting.com
(617) 233-0428

35. FEG Investment Advisors, Cincinnati, OH
\$8.7bn Discretionary assets
\$64bn advisory
Rebecca (Becky) S. Wood, President & CEO
bwood@feg.com
Devinne C. Kelly, Sr. Client Development Associate
dkelly@feg.com
(513) 827-3204

36. Fidelity Institutional Asset Management, Smithfield, RI
\$35bn Discretionary assets (9-30-20)
\$1.03trillion global
Jim Zadrozny, SVP Co-Head of Institutional Sales
jim.zadrozny@pyramis.com
(401) 292-4760
(401) 209-0523 cell

37. Fiduciary Trust Company, Boston, MA
\$7.2bn Discretionary assets
\$19bn total
Rick Tyson, Vice President & Investment Officer
tyson@fiduciary-trust.com
(617) 292-6799

38. Fiduciary Trust International, New York, NY
\$8.6bn OCIO advisory solutions (12-31-20)
\$32bn total
Ronald Sanchez, CIO
rsanchez@ftci.com
Kate Huntington, Head of Advisory Solutions Group
kate.huntington@fiduciarytrust.com
(877) 384-1111

39. Fiduciary Wealth Partners, Boston, MA
\$1.2bn Discretionary assets
\$2.1bn total
Preston McSwain, Managing Partner

preston@fwp.partners
(617) 602-1901

40. Fiducient Advisors (x DiMeo), Chicago, IL

\$10.7bn Discretionary assets

\$215.4bn advisory

Robert (Bob) DiMeo, CEO

bdimeo@fiducient.com

Jon Fellows, Partner & Chairman

jfellows@fiducient.com

Matt Porter, Partner & Vice-chairman Fiduciary

Investment Advisors

mporter@fiducient.com

(312) 853-1000

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

\$3.7bn Discretionary assets

\$4.1 Billion Total assets

Chris McVey, Director of Business Development

cmcvey@flputnam.com

(781) 591-8265

42. Gallagher Fiduciary Advisors, Washington, DC

\$6.03bn Discretionary assets

\$69.19bn advisory

Michael Johnson, President

michael_w_johnson@ajg.com

Phil Fabrizio, Area Director

(202) 898-2270

43. Gerber Taylor, Memphis, TN

\$6.3bn Discretionary assets

\$7.6bn advisory (12-31-20)

Charles Gerber, President

cgerber@gerbertaylor.com

Matthew Kinnear, Client Development

mkinnear@gerbertaylor.com

(901) 526-9750

44. Glenmede, Philadelphia, PA

\$10.1bn tax-exempt OCIO

\$41.6bn total

Gordon Fowler, Jr., President & CEO

gordon.fowler@glenmede.com

(215) 419-6640

45. Global Endowment Management, Charlotte, NC

\$11.7bn Discretionary assets

Stephanie Lynch, Partner

slynch@globalendowment.com

(704) 333-8282

46. Global Strategic Investment Solutions, Scottsdale, AZ

\$1.1bn Discretionary assets

Don Callaghan, Managing Partner

dcallaghan@gsisus.com

(480) 935-2134

47. Goldman Sachs, New York, NY

\$207.7bn Discretionary assets

Gregory Calnon, Managing Director

gregory.calnon@gs.com

(212) 855-0124

48. Hall Capital Partners, San Francisco, CA

\$15.2bn Discretionary assets

\$43.5bn total

Sarah Stein, Managing Partner

sstein@hallcapital.com

(415) 277-2634

Sarah Butler, Business Development Manager

sbutler@hallcapital.com

(415) 217-2449

49. Highland Associates, Birmingham, AL

(RIA owned by Regions Bank)

\$10.5bn Discretionary assets

\$31.2bn total

Trey Echols, CEO

Paige Daniel, Managing Director

pdaniel@highlandassoc.com

(205) 939-8308

50. Hirtle Callaghan, W. Conshohocken, PA

\$17.8bn Discretionary assets

Erica Evans, Head Client Engagement

eevans@hirtlecallaghan.com

(610) 943-4100

51. Holt Capital Partners, Fort Worth, TX

\$380mm total

Robert M. Holt, Jr., Managing Partner

rholt@holtcap.com

(817) 877-1430

52. ICG Advisors, Los Angeles, CA

\$564.98mm Discretionary assets (12-31-20)

\$4.15bn advisory

J. Jeffrey Assaf, Sr., Managing Director & CIO

jassaf@icgadvisors.com

(424) 270-8900

53. Investure, Charlottesville, VA

\$17bn Discretionary assets

Bruce Miller, CEO

bmiller@investure.com

Puja Seam, COO

pseam@investure.com

(434) 220-0280

54. Jasper Ridge Partners, Menlo Park, CA

\$27.5bn Discretionary assets

Cori Duncan, CEO & Managing Partner

cduncan@jasperridge.com

(650) 494-4831

55. JPMorgan Asset & Wealth Management, New York, NY

\$68bn OCIO Discretionary assets

\$2.8trillion total

Monica Issar, Global Head Multi-Asset
& Portfolio Solutions

monica.issar@jpmorgan.com

(212) 464-2852

56. LCG Associates, Atlanta, GA

\$990mm Discretionary assets (12-31-20)

\$101bn advisory (6-1-21)

Lauren Moore, VP Marketing

lcangelosi@lcgassociates.com

Ed Johnson, President & CEO

ejohnson@lcgassociates.com

(770) 644-0100

57. Litman Gregory Asset Management, Walnut Creek, CA

(Bought by iM Global Partners, close 2nd Q 2021)

\$2.2bn Discretionary assets

\$6.3 bn total

(iM Global Partner)

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

bill.thompson@lgam.com

(415) 464-5808

58. Lowe, Brockenbrough, Richmond, VA

\$1.8bn Institutional Discretionary assets

\$3.0bn total

Austin Brockenbrough III, Chairman

abiii@lowebrockenbrough.com

Christopher Dion, Managing Director & CIO

cdion@lowebrockenbrough.com

(804) 287-2744

59. Makena, Menlo Park, CA

\$18bn Discretionary assets

Joseph Magher, Managing Director

jmagher@makenacap.com

(650) 926-1339

60. Mangham Associates, Charlottesville, VA

\$1.9bn AUM

Joel R. Mangham, Founder Co-CIO

Edward W. Karppi, Partner, Co-CIO

Joel Streeter, VP

JoelP.Streeter@manghamassociates.com

(434) 973-2223

61. Marquette Associates, Chicago, IL

\$12.2bn Discretionary assets

\$284.9bn advisory

Brian Wrubel, President & CEO

bwrubel@marquetteassociates.com

Patrick McDowell, SVP, OCIO Services

pmcdowell@marquetteassociates.com

(312) 527-5500

62. Meketa Investment Group, San Diego, CA

\$20.6bn Discretionary assets

\$1.6 trillion advisory

Lisa Rubin, Director Marketing

lrubin@meketa.com

(760) 795-3450

63. Mercer, Boston, MA
\$379bn delegated global
\$15.5trillion advisory (12-31-20)
Samantha Davidson, US Investment Solutions Leader
samantha.davidson@mercer.com
(617) 747-9230

64. Mill Creek Capital Advisors, Conshohocken, PA
Josh Gross, CEO
\$7.5bn Discretionary assets
\$8.5bn total
jgross@millcreekcap.com
(610) 941-7714

65. Miller Investment Management, West Conshohocken, PA
\$1.8bn Discretionary assets (12-31-20)
\$4.0bn total
Timothy P. Letter, Managing Director, business development
tletter@millerinv.com
(610) 834-9820 x136

66. Morgan Creek Capital Management, Chapel Hill, NC
\$2bn Discretionary assets
Mark Yusko, CEO & CIO
myusko@morgancreekcap.com
(919) 933-4004
pclark@morgancreekcap.com

67. Morgan Stanley OCIO/Graystone Consulting, New York, NY
\$44.8bn OCIO Discretionary assets
General OCIO Inquiries
mscustomsolutions@morganstanley.com
(212) 296-6651
Tom Williams, Managing Director, Head of Institutional
Portfolio Solutions, Head of Custom Solutions OCIO
tom.williams@morganstanley.com
(212) 296-6960
Robert Mandel, Managing Director, Head of Graystone
Business & Team Development
robert.j.mandel@morganstanley.com
(914) 225-5420

68. Multilateral Endowment Management Company
"MEMCO," Edmond, OK

\$1.2bn Discretionary assets
Ryan S. Tidwell, CEO & CIO
rtidwell@memco-invest.com
(405) 385-3146

69. NEPC, Boston, MA
\$56.1bn Discretionary assets
\$1.4trillion total
Steve F. Charlton, Director Consulting Services
scharlton@nepc.com
(617) 374-1300

70. New Providence Asset Management, New York, NY
\$2.7bn Discretionary assets
Andrew Vogelstein, Chairman
Sarah Withers, Associate Director
sarah@newprov.com
(646) 292-1272

71. Northern Trust, Chicago, IL
\$102.2bn OCIO Discretionary assets
\$50.2bn advisory
Lyndsay Ferencak, Director
LRF4@ntrs.com
(312) 444-3297
Darius Gill, National Practice Director
DAG9@ntrs.com
(312) 444-7153

72. Pacific Portfolio Consulting, Seattle, WA
\$3.47bn total
Larry Hood, Founder & CEO
larry@pacific-portfolio.com
Kevin O'Connor, Partner, Senior Retirement Program Advisor
koconnor@pacific-portfolio.com
(206) 623-6641 phone
(253) 651-4905 cell

73. Partners Capital, Boston, MA & UK
\$40.6bn total
Paul Dimitruk, Co-Founder and Senior Partner
paul.dimitruk@partners-cap.com
(617) 292-2575
Leslie Ahlstrand, Principal
leslie.ahlstrand@partners-cap.com

(617) 778-7046

74. Pentegra Investors, White Plains, NY
\$15.7bn total Discretionary assets (12-31-20)
Matthew P. Mintzer, EVP Sales & Marketing
matthew.mintzer@pentegra.com
(914) 821-9563

75. Permanens Capital, New York, NY
\$4.1bn Discretionary assets
John Regan, Founding Partner
jr@permcap.com
Alex Goldfarb, Partner
alex@permcap.com
(212) 993-7447

76. Permit Capital Advisors, W. Conshohocken, PA
\$1.4bn Discretionary assets
Mimi Drake, Co-CEO
mdrake@permitcapital.com
Bill Curran, Portfolio Manager
wcurran@permitcapital.com
(610) 940-5331

77. PFM Asset Management, Philadelphia, PA
\$17.2bn Discretionary assets
\$23.4bn total
John Spagnola, Managing Director
spagnolaj@pfm.com
Jim Link, Managing Director
linkj@pfm.com
(215) 557-6700

78. PNC Bank, Philadelphia, PA
\$63.42bn Discretionary assets
Chris McGoldrick, Managing Director OCIO
& Retirement Solutions
chris.mcgoldrick@pnc.com
(215) 585-1244

79. Prime Buchholz & Associates, Portsmouth, NH
\$3.2bn Discretionary assets
\$59bn advisory
William F. McCarron, President
bmc@primebuchholz.com

(603) 433-1143

80. Regions Asset Management, Birmingham, AL

\$46.7bn Discretionary assets

S. Alan McKnight, Jr., CIO

alan.mcknight@regions.com

(404) 979-5418

81. RiskBridge Advisors, New Canaan, CT

\$200mm Discretionary assets

Christopher A. Reynolds, Director Institutional Sales

creynolds@riskbridgeadvisors.com

(770) 299-3832

82. Russell Investments, Seattle, WA

\$269.4bn Discretionary assets

Rob Cittadini, Managing Director, Institutional Sales

rcittadini@russellinvestments.com

(206) 505-2876 (o)

(206) 427-5589 (c)

83. SECOR Asset Management, New York, London

\$28bn Discretionary assets

\$44.6bn total

Kam Chang, Principal

kam@secor-am.com

(212) 980-7365

84. Segal Marco Advisors, Chicago, IL

\$10.3bn Discretionary assets

TJ Kistner, VP, Head of Discretionary

Portfolio Management & Solutions

tkistner@segalmarco.com

(312) 612-8493

85. SEI Institutional Group, Oaks, PA

\$207.7bn Discretionary assets

Michael Cagnina, SVP, Managing Director

mcagnina@seic.com

(610) 676-1496

86. Sellwood Consulting, Portland, OR

\$724mm Discretionary assets

\$7.5bn total

Ashlee Moehring, Consultant, Principal

ashleemoehring@sellwoodconsulting.com
(503) 596-2880

87. Seven Bridges Advisors, New York, NY
\$6.2bn total
M. Ram Lee, Partner
ramlee@sevenbridgesadvisors.com
(212) 490-6320

88. Silvercrest Asset Management, New York, NY
\$21.9bn Discretionary assets
\$29bn total
Chris Long, Managing Director
clong@silvercrestgroup.com
(212) 649-0697

89. Spider Management Company, Richmond, VA
\$5.7bn Discretionary assets
Tory Sprehe, Director of Investor Relations
tsprehe@richmond.edu
(804) 289-6010

90. State Street Global Advisors, Stamford, CT
\$181.2bn Discretionary assets
Gary Sems, VP, Global Fiduciary Solutions
gary_sems@ssga.com
(203) 326-4255

91. Strategic Investment Group, Arlington, VA
\$29.5bn Discretionary assets
\$30.2bn total AUM
Nikki Kraus, Managing Director Client Development
nkraus@strategicgroup.com
(703) 243-4433

92. TIFF Investment Management, Radnor, PA
\$7.4bn Discretionary assets
Kane Brenan, CEO
Rob Zion, COO
Michael Murray, Managing Director
mmurray@tiff.org
(312) 882-0331

93. Truist Bank (x SunTrust), Atlanta, GA
\$16.5bn Discretionary assets

Elizabeth Cabell Jennings, Managing Director
Regional Practice Leader / Truist
Foundations and Endowments Specialty Practice
Elizabeth.C.Jennings@Truist.com
(404) 813-1538 office
(804) 314-5269 Mobile

94. Truvvo Partners, New York, NY
\$3.6bn total
Casey D. Whalen, CEO & CIO
cwhalen@truvvo.com
Ilka Gregory, Director Client Relations
(212) 488-5485

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

96. Vanguard, Malvern, PA
\$65.8bn Discretionary assets
Christopher Philips, Head Institutional Advisory Services
christopher_philips@vanguard.com
(610) 503-1089

97. VELA Investment Management, New Albany, OH
\$150mm Discretionary assets
Ric Dillon, CEO
rdillon@vela-im.com
(614) 653-8352

98. Verger Capital Management, Winston-Salem, NC
\$2.2bn Discretionary assets
Wesley Carroccio, Managing Director
wcarroccio@vergercapital.com
Patrick Decker, Managing Director
pdecker@vergercapital.com
(336) 934-4101

99. Verus Advisory, Seattle, WA
\$5.3bn Discretionary assets
\$580.4bn advisory
Shelly J. Heier, President & Senior consultant
sheier@verusinvestments.com
(206) 622-3700

100. Wealth Strategist Partners, Chicago, IL
\$1bn total
Susan K. Lucas, COO
susan@wspcio.com
(312) 259-8128

101. Wespeth II, Glenview, IL
\$5bn Discretionary assets
T. Joseph Halwax, Managing Director Institutional Services
jhalwax@wespeth.org
(847) 866-4307

102. Willis Towers Watson, Chicago, IL
\$167.74bn Discretionary assets
Kemp Ross, Global Head of Delegated
kemp.ross@willistowerswatson.com
(312) 525-2436
Clint Cary, Head, Delegated Investment Services, Americas
clint.cary@willistowerswatson.com
(312) 525-2406
Pieter Steyn, EMEA Head Delegated Investment Services
pieter.steyn@willistowerswatson.com
44 (0) 207 170 2714

103. Wilshire Associates, Pittsburgh, PA
\$20.4bn Discretionary OCIO assets
\$1.3trillion advisory
Walid Shinnawi, SVP, Head Institutional Business Development
wshinnawi@wilshire.com
(415) 341-6008

104. Worth Venture Partners, New York, NY
\$330mm Discretionary assets
David Wertentheil, Partner
dwertentheil@worthventure.com
(212) 558-9017

104 Firms - Total AUM - \$3.274 Trillion