

Outsource Chief Investment Officer (OCIO) Company Guide Spring 2022

Charles Skorina & Company

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Office: 520-529-5677

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

1. **Acansa Investment Management Group**, Tyson's Corner, VA

\$750mil total

Mary L. Cahill, CEO & CIO

mcahill@acansa-inv.com

(404) 357-0213

2. **Agility**, Denver, CO

\$15.7bn Discretionary assets

Chris Bittman, Partner

cbittman@agilitycio.com

(303) 813-7910

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

\$71.9bn Discretionary assets

\$138.6.bn total

Alan D. Biller, Chairman

Jennifer Newell, CEO

info@alanbiller.com

(650) 328-7283

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

\$4.66bn Discretionary assets

\$5.47bn total

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

TGreen@alescoadvisors.com

(585) 749-0357

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

\$7.7bn Discretionary assets

\$45.8bn total

Michael A. Rosen, CIO & Managing Partner

mrosen@angelesadvisors.com

Garry Duncan, Director

gduncan@angelesinvestments.com

(310) 857-5825

6. **AON**, Chicago, IL

\$220.7bn Discretionary assets

\$3.1 trillion advisory

Ed Bardowski, Partner & Registered Principal

ed.bardowski@aon.com

(484) 941-1409

7. **Appomattox Advisory**, New York, NY

\$1.6bn Discretionary, non-discretionary & committed capital

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

\$1.2bn Discretionary assets

\$2.9bn total

Ryland Moore, Managing Principal, Business Development, Investment Advisor

rmoore@am-a.com

(971) 263-7860 dir

(503) 239-0475 x147

9. **Artemis Wealth Advisors**, New York, NY

\$1.754bn Discretionary assets

\$1.947bn total

Peter M. Rup, Founder & CIO

prup@artemiswa.com

Ron Zdrojeski, Director Business Development

(212) 838-9000

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

\$6.27bn Discretionary assets

\$77.46bn advisory

Michael W. Johnson, Area President Institutional
Investment & Fiduciary Services

michael_w_johnson@ajg.com

(202) 898-2270

11. Asset Strategy Consultants, Baltimore, MD

\$2.4bn Discretionary assets

Andrew W. Conner, CIO

conner@assetstrategyconsultants.com

Juan Buendia, Senior Client Advisor

buendia@assetstrategyconsultants.com

(410) 528-8282

12. Ballentine Partners, Waltham, MA

\$9.1bn Discretionary assets (3-31-21)

\$17.7bn total

Jayson DeAngelis, Partner

jdeangelis@ballentinepartners.com

(781) 314-1316

13. Bank of America, New York, NY

\$40.8bn Institutional Discretionary assets

\$360.4bn 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

\$23.7bn Discretionary assets

\$26bn total

Todd Whitenack, Co-Managing Partner

twhitenack@bbrpartners.com

(212) 313-9875

15. Beacon Pointe Advisors, Newport Beach, CA

\$20bn Discretionary assets

\$25bn Total assets

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

\$301bn global Discretionary asset

Jeff Saef, MD, Head of Americas Portfolio Solutions
within Multi-Asset Strategies & Solutions (MASS)

jeffrey.saef@blackrock.com

(609) 282-8950

17. Blue Edge Capital, Richmond, VA

\$560mm Discretionary assets

\$600mm total

Peter H. Bowles, Managing Director

pbowles@blueedgecap.com

(804) 673-7404

18. BNY Mellon Investor Solutions, New York, NY

\$12.7bn Discretionary assets

\$31.3bn total

Camille Alexander, Head of Global Sales & Distribution

camille.alexander@bnymellon.com

(202) 624-7962

19. Brown Advisory, Baltimore, MD

\$5.8bn OCIO Discretionary assets

\$12bn total Discretionary assets AUM

Brigid Peterson, Head Endowment & Foundations

bpeterson@brownadvisory.com

(410) 537-5379

20. Brown Brothers Harriman, New York, NY

\$56.2bn Total discretionary assets

Tom Davis, Managing Director

thomas.davis@bbh.com

(212) 493-8699

21. Callan, San Francisco, CA

\$32.1bn Discretionary assets

\$3.2trillion advisory

James A. Callahan, President

callahan@callan.com

(415) 974-5060

22. Cambridge Associates, Boston, MA

\$65.9bn Discretionary assets

\$540.8bn advisory

Deirdre Nectow, Managing Director

dnectow@cambridgeassociates.com

(617) 457-1781

23. Canterbury Consulting, Newport Beach, CA

\$3.3bn Discretionary assets

\$28.6bn 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

\$13bn advisory

Elliott Wislar, CEO

ewislar@clrbk.com

Gregg Sibert, Chief Marketing Officer

gsibert@clrbk.com

(212) 683-6686

25. Commonfund, Wilton, CT

\$14.2bn Discretionary OCIO assets

\$28.2bn total AUM

Mark Anson, President, CEO & CIO

Tim Yates, President, CEO & OCIO

tim.yates@commonfund.org

(203) 563-5238

26. Cornerstone Advisors AM, Bethlehem, PA

\$2.6bn Discretionary assets

\$7.6bn total

JP Cavaliere, Senior Consultant

jcavaliere@cornerstone-companies.com

(610) 694-0900 (o)

(484) 941-2685 (c)

27. CornerCap Institutional, Atlanta, GA

\$1.3bn Discretionary assets

Derek Tubbs, VP Institutional Development

dtubbs@cornercap.com

(404) 870-0700

28. CornerStone Partners, Charlottesville, VA

\$9.4bn Discretionary assets

\$10.9bn total

Chris Laing, Senior Managing Director

claing@cstonellc.com

(434) 293-7759

29. Crewcial Partners, New York, NY
\$1.3bn Discretionary assets (3-31-21)
\$36bn advisory
Charlie Georgalas, Managing Director
ccg@crewcialpartners.com
(212) 218-4900

30. DeMarche, Merriam, KS
\$1.3bn Discretionary assets (9-30-21)
\$21.7bn advisory
Thomas C. Woolwine, Vice Chairman,
twoolwine@demarche.com
(913) 384-4994

31. Disciplina, Nashville, TN
\$1.644bn Discretionary assets
Matthew W. Wright, President & CIO
mww@disciplina.com
(615) 490-6002

32. Edgehill Endowment Partners, New Haven, CT
\$2.3bn 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. CapTrust, Raleigh, NC
(Includes Ellwood Associates)
\$96bn Discretionary assets
\$618bn advisory
Gref Middleton, Senior Director Marketing
greg.middleton@captrust.com
(919) 278-9814

34. Evoke | ARIS, Los Angeles, CA
\$7.5bn discretion
\$14bn advisory
Damien Bisserier, Managing Partner, Co-CIO
dbisserier@arisconsulting.com
(424) 283-3802

35. FEG Investment Advisors, Cincinnati, OH

\$10.4bn Discretionary assets

\$81bn advisory

Rebecca (Becky) S. Wood, President & CEO

bwood@feg.com

Devinne Verst, VP Institutional Sales

dverst@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 (3-31-21)

\$19bn total

Rick Tyson, Vice President & Investment Officer

tyson@fiduciary-trust.com

(617) 292-6799

38. Fiduciary Trust International, New York, NY

\$10.2bn OCIO advisory solutions

\$38.1bn 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

\$1.5bn Discretionary assets

\$2.2bn total AUM and AUA

Preston McSwain, Managing Partner

preston@fwp.partners

(617) 602-1901

40. Fiducient Advisors, Chicago, IL

\$12.8bn Discretionary assets

\$226.2bn 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

\$4.5bn Discretionary assets

\$5.3bn total

Chris McVey, Director of Business Development

cmcvey@flputnam.com

(781) 591-8265

42. Gallagher Fiduciary Advisors, Washington, DC

\$6.27bn Discretionary assets

\$77.46bn advisory

Michael Johnson, President

michael_w_johnson@ajg.com

Phil Fabrizio, Area Director

(202) 898-2270

43. Gerber Taylor, Memphis, TN

\$7.1bn Discretionary assets

\$6.9bn advisory

Charles Gerber, President

cgerber@gerbertaylor.com

Matthew Kinnear, Client Development

mkinnear@gerbertaylor.com

(901) 526-9750

44. Glenmede, Philadelphia, PA

\$11.4bn tax-exempt OCIO

\$46.3bn total

Adam M. Conish, Director of Endowment & Foundation Management

adam.conish@glenmede.com

(215) 419-6676

45. Global Endowment Management, Charlotte, NC

\$12.4bn Discretionary assets

Stephanie Lynch, Partner

slynch@globalendowment.com

(704) 333-8282

Alex Kocher, Director

akocher@globalendowment.com

(704) 370-1706

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

\$239bn Discretionary assets

Timothy Braude, Managing Director

timothy.braude@gs.com

(917) 343-2138

48. Hall Capital Partners, San Francisco, CA

\$18.5bn Discretionary assets

\$49.3bn total

Simon Krinsky, Managing Partner

skrinsky@hallcapital.com

(212) 407-0707

Sarah Butler, Business Development Manager

sbutler@hallcapital.com

(415) 217-2449

49. Highland Associates, Birmingham, AL

\$14.4bn Discretionary assets

\$22.2bn AUA

\$36.6bn total

Trey Echols, CEO

Paige Daniel, Managing Director

pdaniel@highlandassoc.com

(205) 939-8308

50. Hirtle Callaghan, W. Conshohocken, PA

\$19.6bn Discretionary assets

Erica Evans, Head Client Engagement

eevans@hirtlecallaghan.com

(610) 943-4100

51. Holt Capital Partners, Fort Worth, TX

\$410mm total

Robert M. Holt, Jr., Managing Partner

rholt@holtcap.com

(817) 877-1430

52. ICG Advisors, Los Angeles, CA
\$7bn Total assets
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
\$36.2bn Discretionary assets
Cori Duncan, CEO & Managing Partner
cduncan@jasperridge.com
(650) 494-4831

55. JPMorgan Asset & Wealth Management, New York, NY
\$73bn OCIO Discretionary assets
\$3.1trillion total
Monica Issar, Global Head Multi-Asset
& Portfolio Solutions
monica.issar@jpmorgan.com
(212) 464-2852

56. LCG Associates, Atlanta, GA
\$1.2bn Discretionary assets
\$115.6bn advisory
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 (3-31-21)
\$6.3 bn total
(iM Global Partner)
Craig Keller, Managing Director, Senior Advisor
craig.keller@lgam.com
(415) 464-5808

58. Lowe, Brockenbrough, Richmond, VA
\$2.2bn Institutional Discretionary assets
\$4.4bn total
Austin Brockenbrough III, Chairman
abiii@lowebrockenbrough.com
Christopher Dion, Managing Director & CIO
cdion@lowebrockenbrough.com
(804) 287-2744

59. Makena, Menlo Park, CA
\$20bn Discretionary assets
Joseph Magher, Managing Director
jmagher@makenacap.com
(650) 926-1339

60. Mangham Associates, Charlottesville, VA
\$1.2bn AUM
Joel R. Mangham, Founder & CIO
Joel Streeter, Director
JoelP.Streeter@manghamassociates.com
(434) 973-2223

61. Marquette Associates, Chicago, IL
\$15.2bn Discretionary assets
\$341.5bn 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
\$24.3bn Discretionary assets
\$1.8 trillion advisory
Lisa Rubin, Director Marketing
lrubin@meketa.com
(760) 795-3450

63. Mercer, New York, NY
\$415bn global discretionary AUM (12-31-21)
\$17.3tr advisory (6-30-21)
Samantha Davidson, US Investment Solutions Leader
samantha.davidson@mercer.com
(617) 747-9230

64. Mill Creek Capital Advisors, Conshohocken, PA

Josh Gross, CEO

\$9.5bn Discretionary assets

jgross@millcreekcap.com

(610) 941-7714

65. Miller Investment Management, West Conshohocken, PA

\$1.967bn Discretionary assets

\$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

\$2.3bn Discretionary assets

Mark Yusko, CEO & CIO

myusko@morgancreekcap.com

(919) 933-4004

pclark@morgancreekcap.com

67. Morgan Stanley OCIO/Graystone Consulting, New York, NY

\$52.6bn 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 Harms, CIO

rharms@memco-invest.com

(405) 334-6588

Ashley Roche COO & General Counsel

aroche@memco-invest.com

405-714-7827

69. NEPC, Boston, MA

\$66.3bn Discretionary assets
\$1.47trillion total
Steve F. Charlton, Director Consulting Services
scharlton@nepc.com
(617) 374-1300

70. New Providence Asset Management, New York, NY
(Sold to Colony 2021 RIA \$16bn)
\$2.7bn Discretionary assets (3-31-21)
Andrew Vogelstein, Chairman
Sarah Withers, Associate Director
sarah@newprov.com
(646) 292-1272

71. Northern Trust, Chicago, IL
\$105bn OCIO Discretionary assets
\$55bn 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
\$4.53bn 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

73. Partners Capital, Boston, MA & UK
\$47.9bn 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
Cathleen Lawless, Business Development Associate
cathleen.lawless@partners-cap.com
(617) 292-1936

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
\$4.4bn 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
\$1.56bn Discretionary assets
Mimi Drake, Co-CEO
[mdrake@permitcapital.com](mailto:m Drake@permitcapital.com)
Bill Curran, Portfolio Manager
wcurran@permitcapital.com
(610) 940-5331

77. PFM Asset Management, Philadelphia, PA
\$19.9bn Discretionary assets
\$26.7bn total Multi-Asset Class
John Spagnola, Managing Director
spagnolaj@pfmam.com
Jim Link, Managing Director
linkj@pfmam.com
(215) 557-1222

78. PNC Bank, Philadelphia, PA
\$69.3bn Discretionary assets
Chris McGoldrick, Managing Director OCIO
& Retirement Solutions
chris.mcgoldrick@pnc.com
(215) 585-1244

79. Prime Buchholz & Associates, Portsmouth, NH
\$3.5bn Discretionary assets
\$59bn advisory
William F. McCarron, President
bmc@primebuchholz.com
(603) 433-1143

80. Regions Asset Management, Birmingham, AL

\$52.4bn Discretionary assets
S. Alan McKnight, Jr., CIO
alan.mcknight@regions.com
(917) 822-3412

81. RiskBridge Advisors, New Canaan, CT
\$400mm Discretionary assets
Christopher A. Reynolds, Director Institutional Sales
creynolds@riskbridgeadvisors.com
(770) 299-3832

82. RockCreek, Washington, D.C.
\$2.3bn Discretionary assets
\$17bn total
Afsaneh Beschloss, President and CEO
clientservices@therockcreekgroup.com
(202) 331-3400

83. Russell Investments, Seattle, WA
\$280.2bn Discretionary assets
Charlie Shaffer, Global Head of Distribution
chsaffer@russellinvestments.com
(646) 334-9492 (c)

84. Segal Marco Advisors, Chicago, IL
\$11.9bn Discretionary assets
\$500bn advisory
TJ Kistner, VP, Head of Discretionary
Portfolio Management & Solutions
tkistner@segalmarco.com
(312) 612-8493

85. SEI Institutional Group, Oaks, PA
\$238.5bn Discretionary assets
Michael Cagnina, SVP, Managing Director
mcagnina@seic.com
(610) 676-1496

86. Sellwood Consulting, Portland, OR
\$1.1mm Discretionary assets
\$8.7bn total
Ashlee Moehring, Consultant, Principal
ashleemoehring@sellwoodconsulting.com
(503) 596-2880

87. Seven Bridges Advisors, New York, NY

\$6.9bn total

Ram Lee, Partner & CIO

ramlee@sevenbridgesadvisors.com

(212) 490-6320

Elise Rosenberg, Managing Director

erosenberg@sevenbridgesadvisors.com

(212) 490-6325

88. Silvercrest Asset Management, New York, NY

\$25.1bn Discretionary assets

\$32.3bn total

Chris Long, Managing Director

clong@silvercrestgroup.com

(212) 649-0697

89. Spider Management Company, Richmond, VA

\$6.2bn Discretionary assets

Tory Sprehe, Director of Investor Relations

tsprehe@richmond.edu

(804) 200-6902

90. State Street Global Advisors, Stamford, CT

\$191.8bn Discretionary assets

Gary Sems, VP, Global Fiduciary Solutions

gary_sems@ssga.com

(203) 326-4255

91. Strategic Investment Group, Arlington, VA

\$27.9bn Discretionary assets

\$28.6bn total AUM

Nikki Kraus, Managing Director Client Development

nkraus@strategicgroup.com

(703) 243-4433

92. TIFF Investment Management, Radnor, PA

\$8bn Discretionary assets

Kane Brenan, CEO

Rob Zion, COO

Jerrold Charles, Director of Business Development

jcharles@tiff.org

(917) 501-0241

93. Truist Bank, 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
(804) 782-7016 office
(804) 314-5269 Mobile

94. Truvvo Partners, New York, NY
\$4.1bn total
Casey D. Whalen, CEO & CIO
cwhalen@truvvo.com
Ilka Gregory, Director Client Relations
igregory@truvvo.com
(212) 488-5485

95. UBS AG, Chicago, IL
\$16.1bn OCIO Discretionary assets
Thomas Digenan, Head of Investment Solutions Specialists for Americas
thomas.digenan@ubs.com
(312) 525-7975
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
\$71bn Discretionary assets
Christopher Philips, Head Institutional Advisory Services
christopher_philips@vanguard.com
(610) 503-1089

97. VELA Investment Management, New Albany, OH
\$250mm Discretionary assets
Ric Dillon, CEO
rdillon@vela-im.com
(614) 323-6916

98. Verger Capital Management, Winston-Salem, NC
\$2.4bn Discretionary assets
Patrick Decker, Managing Director
pdecker@vergercapital.com
(336) 934-4145

99. Verus Advisory, Seattle, WA
\$5.24bn Discretionary assets
\$659.2bn advisory
Shelly J. Heier, President & Senior consultant
sheier@verusinvestments.com
(206) 622-3700

100. Wespeth Institutional, Glenview, IL
\$5.3bn Discretionary assets
T. Joseph Halwax, Managing Director Institutional Services
jhalwax@wespeth.org
(847) 866-4307

101. Willis Towers Watson, Chicago, IL
\$186.8bn Discretionary assets
Nimisha Srivastava, Head of Investments, North America
nimisha.srivastava@willistowerswatson.com
(312) 525-2111
Mark Calnan, Head, Head of Investments, EMEA
mark.calnan@willistowerswatson.com
44 (0) 207 170 2819

102. Wilshire Associates, Santa Monica, CA
\$24.03bn Discretionary OCIO assets
\$1.3trillion advisory
Carolyn Gilbert Pejsa, Vice President, Business Development
cgilbert@wilshire.com
(630) 464-0456 cell

103. Worth Venture Partners, New York, NY
\$395mm Discretionary assets
David Wertentheil, Partner
dwertentheil@worthventure.com
(212) 558-9017

103 Firms - \$3.658 Trillion in Total AUM