

Outsource Chief Investment Officer (OCIO) Company Guide Spring 2022

Charles Skorina & Company

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

Office: 520-529-5677

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

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

\$750mm 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

\$138.6bn 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, Managing Director, Head of Client Development

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. **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

11. Ballentine Partners, Waltham, MA

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

\$17.7bn total

Jayson DeAngelis, Partner

jdeangelis@ballentinepartners.com

(781) 314-1316

12. 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

13. BBR Partners, New York, NY

\$23.7bn Discretionary assets

\$26bn total

Todd Whitenack, Co-Managing Partner

twhitenack@bbrpartners.com

(212) 313-9875

14. 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

15. 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

16. Blue Edge Capital, Richmond, VA

\$560mm Discretionary assets

\$600mm total

Peter H. Bowles, Managing Director

pbowles@blueedgecap.com

(804) 673-7404

17. 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

18. 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

19. Brown Brothers Harriman, New York, NY

\$56.2bn Total discretionary assets

Tom Davis, Managing Director

thomas.davis@bbh.com

(212) 493-8699

20. Callan, San Francisco, CA

\$32.1bn Discretionary assets

\$3.2 trillion advisory

James A. Callahan, President

callahan@callan.com

(415) 974-5060

21. Cambridge Associates, Boston, MA

\$65.9bn Discretionary assets

\$540.8bn advisory

Deirdre Nectow, Managing Director

dnectow@cambridgeassociates.com

(617) 457-1781

22. 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

23. Clearbrook Global Advisors, New York, NY

\$1.7bn Discretionary assets
\$13bn advisory
Elliott Wislar, CEO
ewislar@clrbrk.com
Gregg Sibert, Chief Marketing Officer
gsibert@clrbrk.com
(212) 683-6686

24. **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

25. **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)

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

27. **CornerStone Partners**, Charlottesville, VA
\$9.4bn Discretionary assets
\$10.9bn total
Chris Laing, Senior Managing Director
claing@cstonellc.com
(434) 293-7759

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

29. **DeMarche**, Merriam, KS

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

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

31. 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

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

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

34. 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

35. 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

36. 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

37. 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

38. 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

39. 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

40. 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

41. 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

42. 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

43. 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

44. 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

45. Global Strategic Investment Solutions, Scottsdale, AZ
\$1.1bn Discretionary assets
Don Callaghan, Managing Partner
dcallaghan@gsisus.com
(480) 935-2134

46. Goldman Sachs, New York, NY

\$239bn Discretionary assets

Timothy Braude, Managing Director

timothy.braude@gs.com

(917) 343-2138

47. 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

48. Harpswell Capital Advisors, New Gloucester, ME

\$455mm Discretionary assets

\$535mm Advisory

John P. Moore, CFA. Managing Partner, CIO

Vanessa M. Bryant. COO

jpm@harpswelladvisors.com

vmb@harpswelladvisors.com

207-926-1348

49. HighGround Advisors, Dallas, TX

\$1.5bn Discretionary assets

\$2.5bn total

David M. Slover, SVP & Chief Strategy Officer

david.slover@highgroundadvisors.org

(214) 978-3300

50. 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

51. Hirtle Callaghan, W. Conshohocken, PA

\$19.6bn Discretionary assets

Erica Evans, Head Client Engagement

eevans@hirtlecallaghan.com

(610) 943-4100

52. Holt Capital Partners, Fort Worth, TX

\$410mm Total

Robert M. Holt, Jr., Managing Partner

rholt@holtcap.com

(817) 877-1430

53. ICG Advisors, Los Angeles, CA

\$7bn Total assets

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

jassaf@icgadvisors.com

(424) 270-8900

54. Investure, Charlottesville, VA

\$17bn Discretionary assets

Bruce Miller, CEO

bmiller@investure.com

Puja Seam, COO

pseam@investure.com

(434) 220-0280

55. Jasper Ridge Partners, Menlo Park, CA

\$36.2bn Discretionary assets

Cori Duncan, CEO & Managing Partner

cduncan@jasperridge.com

(650) 494-4831

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

\$130.4bn OCIO discretionary assets

\$3.1trillion total

Monica Issar, Global Head Multi-Asset

& Portfolio Solutions

monica.issar@jpmorgan.com

(212) 464-2852

57. LCG Associates, Atlanta, GA

\$1.2bn Discretionary assets

\$115.6bn advisory

Ed Johnson, President & CEO

ejohnson@lcgassociates.com

(770) 644-0100

58. Litman Gregory AM (iM Global Partner), Walnut Creek, CA

\$2.2bn Discretionary assets (3-31-21)

\$6.3bn total

Craig Keller, Managing Director, Senior Advisor

craig.keller@lgam.com

(415) 464-5808

59. 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

60. Makena, Menlo Park, CA

\$20bn Discretionary assets

Joseph Magher, Managing Director

jmagher@makenacap.com

(650) 926-1339

61. Mangham Associates, Charlottesville, VA

\$1.2bn AUM

Joel R. Mangham, Founder & CIO

Joel Streeter, Director

JoelP.Streeter@manghamassociates.com

(434) 973-2223

62. Marquette Associates, Chicago, IL

\$15.2bn Discretionary assets

\$341.5bn advisory

Brian Wrubel, President & CEO

bwrubel@marquetteassociates.com

Patrick McDowell, SVP, OCIO Services

pmedowell@marquetteassociates.com

(312) 527-5500

63. Meketa Investment Group, San Diego, CA

\$24.3bn Discretionary assets

\$1.8 trillion advisory

Lisa Rubin, Director Marketing

lrubin@meketa.com

(760) 795-3450

64. Mercer, New York, NY

\$415bn global discretionary AUM (12-31-21)

\$17.3trillion advisory (6-30-21)
Samantha Davidson, US Investment Solutions Leader
samantha.davidson@mercerc.com
(617) 747-9230

65. Mill Creek Capital Advisors, Conshohocken, PA
Josh Gross, CEO
\$9.5bn Discretionary assets
jgross@millcreekcap.com
(610) 941-7714

66. 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

67. Morgan Creek Capital Management, Chapel Hill, NC
\$2.3bn Discretionary assets
Mark Yusko, CEO & CIO
myusko@morgancreekcap.com
(919) 933-4004
pclark@morgancreekcap.com

68. 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

69. 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

70. Natixis Investment Managers Solutions, Boston, MA
\$5.4bn OCIO discretionary assets
\$1.1trillion total firm AUM
Patrick Lee, Managing Regional Director
patrick.lee@natixis.com
(310) 383-6257

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

72. 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

73. 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

74. 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

75. 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

76. 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

77. 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

78. Permit Capital Advisors, W. Conshohocken, PA

\$1.56bn Discretionary assets

Mimi Drake, Co-CEO

m Drake@permitcapital.com

Bill Curran, Portfolio Manager

wcurran@permitcapital.com

(610) 940-5331

79. 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

80. Pivotal Advisors, New York, NY

\$400mm Discretionary assets

Tiffany McGhee, CEO & CIO

tiffany@pivotal-advisors.com
(646) 535-1097

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

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

83. Principal Global Advisors, Overland Park, KS
\$29.7bn Discretionary assets
Dan Oldani, Managing Director, Head of Investor Solutions
oldani.daniel@principal.com
(833) 290-4678

84. Prodigy Asset Management, Omaha, NE
\$3.6bn Discretionary assets
Phil Ruden, Managing Partner
phil.ruden@prodigyllc.com
(402) 493-9875

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

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

87. RockCreek, Washington, D.C.
\$2.3bn Discretionary assets
\$17bn total
Afsaneh Beschloss, President and CEO

clientservices@therockcreekgroup.com
(202) 331-3400

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

89. 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

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

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

92. 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

93. Silvercrest Asset Management, New York, NY
\$25.1bn Discretionary assets
\$32.3bn total
Chris Long, Managing Director
clong@silvercrestgroup.com
(212) 649-0697

94. Spider Management Company, Richmond, VA
\$6.2bn Discretionary assets
Tory Sprehe, Director of Investor Relations
tsprehe@richmond.edu
(804) 200-6902

95. State Street Global Advisors, Stamford, CT
\$191.8bn Discretionary assets
Martha Coxe, VP, Investment Solutions Group
martha_coxe@ssga.com
(617) 662-5008

96. 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

97. Syntrinsic Investment Counsel, Denver, CO
\$1.7bn Discretionary assets
\$2.3bn total
Jim Brauer, Managing Director
jim.brauer@syntrinsic.com
(303) 518-6370

98. 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

99. 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

100. 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

101. 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

102. Vanguard, Malvern, PA

\$71bn Discretionary assets

Christopher Philips, Head Institutional Advisory Services

christopher_philips@vanguard.com

(610) 503-1089

103. VELA Investment Management, New Albany, OH

\$250mm Discretionary assets

Ric Dillon, CEO

rdillon@vela-im.com

(614) 323-6916

104. Verger Capital Management, Winston-Salem, NC

\$2.4bn Discretionary assets

Patrick Decker, Managing Director

pdecker@vergercapital.com

(336) 934-4145

105. Verus Advisory, Seattle, WA

\$5.24bn Discretionary assets

\$659.2bn advisory

Shelly J. Heier, President & Senior consultant

sheier@verusinvestments.com

(206) 622-3700

106. Wespeth Institutional, Glenview, IL

\$5.3bn Discretionary assets

T. Joseph Halwax, Managing Director Institutional Services

jhalwax@wespath.org

(847) 866-4307

107. 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

108. 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

109. Worth Venture Partners, New York, NY

\$395mm Discretionary assets

David Wertentheil, Partner

dwertentheil@worthventure.com

(212) 558-9017

109 Firms - \$3.75 Trillion in Total AUM