

Outsource Chief Investment Officer (OCIO) Directory, Summer 2023

Charles Skorina & Company

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Office: 520-529-5677

(AUM as of December 31, 2022, unless otherwise noted)

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

\$750mm Total

Mary L. Cahill, CEO & CIO

mcahill@acansa-inv.com

(703) 639-1888

2. **Agility**, Denver, CO

\$13.8bn discretionary assets

Chris Bittman, Partner

cbittman@agilitycio.com

(303) 813-7910

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

\$72.4bn discretionary assets

\$132.1bn total

Alan D. Biller, Chairman

Jennifer Newell, CEO

info@alanbiller.com

(650) 328-7283

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

\$4.3bn discretionary assets

\$5.1bn total

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

TGreen@alescoadvisors.com

(585) 749-0357

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

\$6.2bn discretionary assets

\$37.8bn total

Garry Duncan, Managing Director, Head of Client Development
gduncan@angelesinvestments.com
(310) 857-5825

6. **AON**, Chicago, IL
\$148.7bn Global discretionary assets
\$3.79 trillion global advisory
Ed Bardowski, Partner & Registered Principal
ed.bardowski@aon.com
(484) 941-1409

7. **Appomattox Advisory**, New York, NY
\$1.4bn discretionary, non-discretionary & committed capital
Susan Webb, Founder, CEO & CIO
Drianne Benner, Managing Director
dbenner@appomattox.com
(212) 895-3012

8. **Arnerich Massena**, Portland, OR
\$1.1bn discretionary assets
\$2.1bn 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
\$1.32bn discretionary assets
\$1.6bn total
Peter M. Rup, Founder & CIO
prup@artemiswa.com
Ron Zdrojeski, Director Business Development
(212) 838-9000

10. **Asset Consulting Group**, St. Louis, MO
\$508mm discretionary assets
\$173bn total
George A Tarlas, Senior Managing Director
george.tarlas@acgnet.com
(314) 862-4848

11. **Asset Strategy Consultants**, Baltimore, MD
\$2bn 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
\$9.8bn discretionary assets (3-31-21)
\$21bn total
Jayson DeAngelis, Partner
jdeangelis@ballentinepartners.com
(781) 314-1316

13. Bank of America, New York, NY
\$71bn Institutional discretionary assets
\$1.4trillion total managed assets
Bernard Reidy, Managing Director, National
Endowment and Foundations Executive
bernard.reidy@bofa.com
(203) 571-5341

14. BBR Partners, New York, NY
\$22bn discretionary assets
\$24bn total
Todd Whitenack, Co-Managing Partner
twhitenack@bbrpartners.com
(212) 313-9875

15. BlackRock, New York, NY
\$307bn 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
\$500mm discretionary assets
\$550mm total
Peter H. Bowles, Managing Director
pbowles@blueedgecap.com
(804) 673-7404

17. BNY Mellon Investor Solutions, New York, NY
\$9.5bn discretionary assets
\$27.1bn total
Camille Alexander, Head of Global Sales & Distribution
camille.alexander@bnymellon.com

(202) 624-7962

18. Brockenbrough, Richmond, VA
\$1.5bn OCIO discretionary assets
\$3.8bn total
Wesley Carroccio, Managing Director, Strategic Initiatives
wcarroccio@brockenbroughinc.com
(610) 659-9168

19. Brown Advisory, Baltimore, MD
\$5.5bn 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
\$35bn discretionary assets
\$3.2 trillion advisory
James A. Callahan, President
callahan@callan.com
(415) 974-5060

22. Cambridge Associates, Boston, MA
\$63.7bn discretionary assets
\$548.1bn advisory
Deirdre Nectow, Managing Director
dnectow@cambridgeassociates.com
(617) 457-1781

23. Canterbury Consulting, Newport Beach, CA
\$2.4bn 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. **Capricorn Investment Group**, New York, NY

\$5.5bn discretionary assets

\$9bn total

Kunle Apampa, Head of Client Advisory & Partnerships

kapampa@capricornllc.com

(646) 289-3031

25. **Captrust**, Raleigh, NC

\$126bn discretionary assets

\$620bn advisory

Greg Middleton, Senior Director Marketing

greg.middleton@captrust.com

(919) 278-9814

26. **Cerity Partners**, W. Conshohocken, PA

\$63bn discretionary assets

Mimi Drake, Partner, Co-Market Leader

mdrake@ceritypartners.com

(610) 834-5873

Bill Curran, Partner

bcurran@ceritypartners.com

(610) 940-5331

27. **Clearbrook Global Advisors**, New York, NY

\$1.7bn discretionary assets

\$12bn advisory

Elliott Wislar, CEO

ewislar@clrbk.com

Gregg Sibert, Chief Marketing Officer

gsibert@clrbk.com

(212) 683-6686

28. **Commonfund**, Wilton, CT

\$11.7bn discretionary OCIO assets

\$25.3bn total AUM

Mark Anson, President, CEO & CIO

Tim Yates, President, CEO & OCIO

tim.yates@commonfund.org

(203) 563-5238

29. **CornerCap Institutional**, Atlanta, GA

\$1.1bn discretionary assets

Derek Tubbs, VP Institutional Development

dtubbs@cornercap.com

(404) 870-0700

30. Cornerstone Advisors AM, Bethlehem, PA

\$3.3bn discretionary assets

\$6.6bn total

J.P. Cavaliere, Senior Consultant

jcavaliere@cornerstone-companies.com

(610) 694-0900 (o)

(484) 941-2685 (c)

31. CornerStone Partners, Charlottesville, VA

\$10.24bn discretionary assets

\$11.6bn total

Mike Pagliaro, Director

mpagliaro@cstonellc.com

(610) 290-6660

32. Crewcial Partners, New York, NY

\$1.1bn discretionary assets (3-31-21)

\$36bn advisory

Charlie Georgalas, Managing Director

ccg@crewcialpartners.com

(212) 218-4900

33. Disciplina, Nashville, TN

\$1.9bn discretionary assets (2-28-23)

Matthew W. Wright, President & CIO

mww@disciplina.com

(615) 490-6002

34. Edgehill Endowment Partners, New Haven, CT

\$2.0bn 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

35. Evoke Advisors, Los Angeles, CA

\$10bn discretionary assets

\$25bn advisory

Damien Bisserier, Managing Partner, Co-CIO

dbisserier@evokedadvisors.com

(424) 283-3802

36. FEG Investment Advisors, Cincinnati, OH

\$10.1bn discretionary assets

\$72.5bn advisory

Rebecca (Becky) S. Wood, President & CEO

bwood@feg.com

Devinne Verst, VP Institutional Sales

dverst@feg.com

(513) 827-3204

37. Fidelity Institutional, Boston, MA

\$17bn OCIO Advisory Solutions

Eric Lussen, SVP, Business Development

eric.lussen@fmr.com

O: (312) 343-4408

Danielle M.G. Frissell, SVP, Endowments & Foundations

danielle.frissell@fmr.com

O: (401) 292-3452

38. Fiduciary Trust International, New York, NY

\$8.1bn discretionary assets

\$32bn total

Ronald Sanchez, CIO

rsanchez@ftci.com

Kate Huntington, Head of Advisory Solutions Group

kate.huntington@ftci.com

(877) 384-1111

39. Fiduciary Wealth Partners, Boston, MA

\$1.3bn discretionary assets

\$1.8bn total AUM and AUA

Preston McSwain, Managing Partner

preston@fwp.partners

(617) 602-1901

40. Fiducient Advisors, Chicago, IL

\$16.9bn discretionary assets

\$225.1bn advisory

Robert (Bob) DiMeo, CEO

bdimeo@fiducient.com

Mike Chase, Partner & Head of Endowments, Foundations, OCIO

mchase@fiducient.com

Matt Porter, Partner & Senior Consultant, Endowments, Foundations
Investment Advisors

mporter@fiducient.com

(800) 260-5445

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

\$4.5bn discretionary assets

\$6.3bn total

Chris McVey, Director of Business Development

cmcvey@flputnam.com

(781) 591-8265

42. Gallagher Fiduciary Advisors, Washington, DC

\$5.41bn discretionary assets

\$63.85bn advisory

Michael Johnson, President

michael_w_johnson@ajg.com

Phil Fabrizio, Area Director

(202) 898-2270

43. Gerber Taylor, Memphis, TN

\$6.6bn discretionary assets

\$6.0bn advisory

Charles Gerber, President

cgerber@gerbertaylor.com

Matthew Kinnear, Client Development

mkinnear@gerbertaylor.com

(901) 526-9750

44. Glenmede, Philadelphia, PA

\$10.2bn Tax-exempt OCIO assets

\$40.5bn total

Adam M. Conish, Director of Endowment & Foundation Management

adam.conish@glenmede.com

(215) 419-6676

45. Global Endowment Management, Charlotte, NC

\$11bn discretionary assets

Stephanie Lynch, Partner

slynch@globalendowment.com

(704) 333-8282

Matt Bank, Partner

mbank@globalendowment.com

(704) 370-1686

46. Global Strategic Investment Solutions, Scottsdale, AZ

\$1.2bn discretionary assets

Don Callaghan, Managing Partner
dcallaghan@gsisus.com
(215) 919-3116

47. Goldman Sachs, New York, NY
\$207.6bn discretionary assets
\$2.5 trillion total
Timothy Braude, Managing Director
timothy.braude@gs.com
(917) 343-2138

48. Hall Capital Partners, San Francisco, CA
\$15.4bn discretionary assets
\$40.1bn total
Simon Krinsky, Managing Partner
skrinsky@hallcapital.com
(212) 407-0707
Krista Smith, Business Development Associate
ksmith@hallcapital.com
(415) 277-2624

49. Harpswell Capital Advisors, New Gloucester, ME
\$430mm discretionary assets
\$500mm advisory
Jack Moore, CFA. CIO small endowments (\$8-\$80mm)
Vanessa M. Bryant. COO
Jpm@harpswelladvisors.com
Vmb@harpswelladvisors.com
(877) HARP-CAP

50. Highland Associates, Birmingham, AL
\$13.6bn discretionary assets
\$13.bn AUA
\$26.6bn total
Trey Echols, CEO
Courtney Crane, Marketing & Sales Development Partner
[ccrane@harbert.net](mailto:crcrane@harbert.net)
(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 CIO, Fort Worth, TX
\$375mm Total
Robert M. Holt, Jr., Managing Partner
rholt@holtcap.com
(817) 877-1430

53. ICG Advisors, Los Angeles, CA
\$6.65bn Total assets
J. Jeffrey Assaf, Sr. Managing Director & CIO
jassaf@icgadvisors.com
(424) 270-8900

54. Investure, Charlottesville, VA
\$14bn discretionary assets
\$17bn Total
Bruce Miller, CEO
bmiller@investure.com
Puja Seam, COO
pseam@investure.com
(434) 220-0280

55. Jasper Ridge Partners, Menlo Park, CA
\$32.2bn discretionary assets 9-30-22
Cori Duncan, CEO & Managing Partner
cduncan@jasperridge.com
(650) 494-4831

56. J.P. Morgan Asset & Wealth Management, New York, NY
\$130.2bn OCIO discretionary assets
\$2.8 trillion total
Monica Issar, Global Head Multi-Asset
& Portfolio Solutions
monica.issar@jpmorgan.com
(212) 464-2852

57. Lazard Family Office Partners, New York, NY
\$8bn Total
Casey D. Whalen, Head and Chief Investment Officer
casey.whalen@lazard.com
(212) 488-5485

58. LCG Associates, Atlanta, GA
\$1.6bn discretionary assets
\$106bn advisory
Ed Johnson, President & CEO

ejohnson@lcgassociates.com
(770) 644-0100

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

60. Marquette Associates, Chicago, IL
\$14.1bn discretionary assets
\$337.5bn advisory
Brian Wrubel, President & CEO
bwrubel@marquetteassociates.com
Patrick McDowell, SVP, OCIO Services
pmcdowell@marquetteassociates.com
(312) 527-5500

61. Meketa Investment Group, San Diego, CA
\$24bn discretionary assets
\$1.6 trillion advisory
Lisa Rubin, Director Marketing
lrubin@meketa.com
(760) 795-3450

62. Mercer, New York, NY
\$344.9bn global discretionary
\$16.2trillion advisory
Rich Joseph, US Wealth Distribution Leader
rich.joseph@mercer.com
(617) 747-9540

63. Mill Creek Capital Advisors, Conshohocken, PA
\$9.0bn discretionary assets
\$9.5bn total
Josh Gross, CEO
jgross@millcreekcap.com
(610) 941-7714

64. Miller Investment Management, West Conshohocken, PA
\$1.7bn discretionary assets
\$3.4bn non-discretion
\$5.1bn total
Timothy P. Letter, Managing Director, business development
tletter@millerinv.com

(610) 834-9820 x136

65. Morgan Creek Capital Management, Chapel Hill, NC

\$2.3bn discretionary assets

Mark Yusko, CEO & CIO

myusko@morgancreekcap.com

(919) 933-4004

pclark@morgancreekcap.com

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

\$66.7bn OCIO discretionary assets

General OCIO Inquiries

msocio@morganstanley.com

(212) 296-7735

Tom Williams, Managing Director, Head of OCIO Investments

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

67. Multilateral Endowment Management Co.,

“MEMCO,” Edmond, OK

\$1.2bn discretionary assets

\$2.5 total

Ryan Harms, CIO

rharms@memco-invest.com

(405) 334-6588

Ashley Roche COO & General Counsel

aroche@memco-invest.com

405-714-7827

68. Natixis Investment Managers Solutions, Boston, MA

\$5.17bn OCIO discretionary assets

\$1.1 trillion total firm AUM

Devin Griffin, VP Consultant Relations

devin.griffin@natixis.com

(617) 449-2633

69. NEPC, Boston, MA

\$59.8bn discretionary assets

\$1.3 trillion total

Steve F. Charlton, Director Consulting Services

scharlton@nepc.com

(617) 374-1300

70. Northern Trust, Chicago, IL

\$87.3bn OCIO discretionary assets

\$46.7bn advisory

\$1.2 total managed assets

Lyndsay Ferencak, Director Senior OCIO Specialist

LRF4@ntrs.com

(312) 444-3297

Darius Gill, National Practice Director

DAG9@ntrs.com

(312) 444-7153

71. Pacific Portfolio Consulting, Seattle, WA

\$4.5bn 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

72. Partners Capital Investment Group, Boston & London

\$48bn Total

Leslie (Ahlstrand) Fitzgerald, Managing Director

leslie.ahlstrand@partners-cap.com

(617) 778-7046

Cathleen Lawless, Business Development Senior Associate

cathleen.lawless@partners-cap.com

(617) 292-1936

73. Permanens Capital, New York, NY

\$4.2bn discretionary assets

John Regan, Founding Partner

jr@permcap.com

(212) 993-7466

Connor Carew, Partner

connor@permcap.com

(212) 993-7449

74. PFM Asset Management, Philadelphia, PA

\$16.9bn discretionary assets

\$202.4bn Total

Jim Link, Managing Director

linkj@pfmam.com

John Spagnola, Managing Director

spagnolaj@pfmam.com
(215) 557-1222

75. Pivotal Advisors, New York, NY
\$400mm discretionary assets
Tiffany McGhee, CEO & CIO
tiffany@pivotal-advisors.com
(646) 535-1097

76. PNC Bank, Philadelphia, PA
\$67.7bn discretionary assets
Chris McGoldrick, Managing Director OCIO
& Retirement Solutions
chris.mcgoldrick@pnc.com
(215) 585-1244

77. Prime Buchholz & Associates, Portsmouth, NH
\$3.5bn discretionary assets
\$65bn advisory
William F. McCarron, President
bmc@primebuchholz.com
(603) 433-1143

78. Principal Asset Management, Des Moines, IA
\$23.1bn OCIO discretionary assets
\$465bn total AUM
Dan Oldani, Managing Director, OCIO
oldani.daniel@principal.com
(210) 365-3906

79. Prodigy Asset Management, Omaha, NE
\$3.4bn discretionary assets
Arnaldo Ovalles, Partner
arnaldo.ovalles@prodigyllc.com
(402) 502-3231

80. Regions Asset Management, Birmingham, AL
\$49.8.4bn discretionary assets
S. Alan McKnight, Jr., CIO
alan.mcknight@regions.com
(917) 822-3412

81. RiskBridge Advisors, New Canaan, CT
\$450mm discretionary assets
\$50bn advisory

Christopher A. Reynolds, Director Institutional Sales
creynolds@riskbridgeadvisors.com
(770) 299-3832

82. RockCreek, Washington, D.C.
\$3.6bn discretionary assets
\$16bn total
Afsaneh Beschloss, President and CEO
Alifia Doriwala, Co-CIO for OCIO
clientservices@therockcreekgroup.com
(202) 331-3400

83. Russell Investments, Seattle, WA
\$236.8bn discretionary assets
Charlie Shaffer, Global Head of Distribution
chsaffer@russellinvestments.com
(646) 334-9492
Rob Cittadini, Global COO of Distribution
rcittadini@russellinvestments.com
(206) 505-2876

84. SEI Institutional Group, Oaks, PA
\$203.8bn discretionary assets
Michael Cagnina, SVP, Managing Director
mcagnina@seic.com
(610) 676-1496

85. Sellwood Consulting, Portland, OR
\$1.1mm discretionary assets 9-30-22
\$7.5bn total
Ashlee Moehring, Consultant, Principal
ashleemoehring@sellwoodconsulting.com
(503) 596-2880

86. Seven Bridges Advisors, New York, NY
\$5.5bn Total
Ram Lee, Partner & CIO
ramlee@sevenbridgesadvisors.com
(212) 490-6320

87. Silvercrest Asset Management, New York, NY
\$20.9bn discretionary assets
\$28.9bn total
Chris Long, Director Endowment & Foundation Investment Solutions
clong@silvercrestgroup.com

(212) 649-0697

88. Spider Management Company, Richmond, VA

\$5.8bn discretionary assets

William H. McLean, President and CIO

wmclean2@richmond.edu

Rebecca Fender, Director of Investor Relations

rfender@richmond.edu

(804) 289-6902

89. State Street Global Advisors, Boston, MA

\$146.2bn discretionary assets

Jack Serhant, VP, Investment Solutions Group

Jack_Serhant@ssga.com

(617) 664-4599

Robert_Spencer@ssga.com, Head of portfolio solutions

(617)664-9489

90. Strategic Investment Group, Arlington, VA

\$25.5bn discretionary assets

\$25.9bn total AUM

Nikki Kraus, President & Chief Client Officer

nkraus@strategicgroup.com

(703) 243-4433

91. Summit Rock Advisors, New York, NY

\$18.6bn discretionary assets (avg. client \$400MM+)

David Dechman, CEO & co-Founder

david.dechman@summit-rock.com

(212) 993-7150

92. Syntrinsic Investment Counsel, Denver, CO

\$1.6bn discretionary assets

\$2.2bn total

Jim Brauer, Managing Director

jim.brauer@syntrinsic.com

(303) 518-6370

93. The Colony Group, New York, NY

\$2.2bn discretionary assets

\$19.4 total

Andrew W. Vogelstein, President, Institutional Advisory Practice

Sarah Withers, Associate Director

swithers@thecolonygroup.com

(646) 292-1272

94. The Family Office at Synovus, Columbus, GA

\$7.5bn discretionary assets

\$10 AUA

Katherine Dunlevie, President & CEO

katherinedunlevie@synovus.com

(706) 641-3997

Mike Sluder, CIO

michaelsluder@synovus.com

(706) 644-2063

95. 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

96. Truist Bank, Atlanta, GA

\$14bn discretionary assets

Stephen Yarbrough, Foundations & Endowments Specialty Practice

Stephen.yarbrough@truist.com

404-788-4401

97. UBS AG, Chicago, IL

\$16.1bn OCIO discretionary assets

Mohammad Ahmad, Head, Business Development

mohammad.ahmad@ubs.com

41 79 629 48 29

Waiting for a post-merger update

98. Vanguard, Malvern, PA

\$59bn discretionary assets

Daniel W. Newhall, Principal, Institutional Investor Group

daniel_w_newhall@vanguard.com

(610) 669-1596

99. VELA Investment Management, New Albany, OH

\$346mm discretionary assets

Ric Dillon, Co-Founder & CEO

rdillon@vela-im.com

(614) 323-6916

100. Verger Capital Management, Winston-Salem, NC

\$2.4bn discretionary assets
Patrick Decker, Managing Director
pdecker@vergercapital.com
Michael Collins, Managing Director
mcollins@vergercapital.com
(336) 934-4145

101. Verus Advisory, Seattle, WA
\$4bn discretionary assets
\$655bn advisory
Shelly J. Heier, President & Senior consultant
sheier@verusinvestments.com
(206) 622-3700

102. Wespath Institutional, Glenview, IL
\$4.4bn discretionary assets
T. Joseph Halwax, Managing Director Institutional Services
jhalwax@wespath.org
(847) 866-4307

103. Willis Towers Watson, Chicago, IL
\$163bn discretionary assets
Nimisha Srivastava, Head of Investments, North America
nimisha.srivastava@wtwco.com
(704) 806-1652
Mark Calnan, Head of Investments, Europe
mark.calnan@wtwco.com
44 (0) 207 170 2819

104. Wilshire Advisors, Santa Monica, CA
\$21.4bn discretionary OCIO assets
\$1.3 trillion advisory
Nancy Arias, Sr. Associate, Business Development
narias@wilshire.com
(310) 260-6712 cell

104 Firms - \$3.4 Trillion AUM