

# Outsource Chief Investment Officer (OCIO) Directory, spring 2024

## Charles Skorina & Company

<http://www.charlesskorina.com> [skorina@charlesskorina.com](mailto:skorina@charlesskorina.com)

Office: 520-529-5677

(AUM as of December 31, 2023, unless otherwise noted)

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

**\$850mm** Total

Mary L. Cahill, CEO & CIO

[mcahill@acansa-inv.com](mailto:mcahill@acansa-inv.com)

(703) 639-1888

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### 2. **Aetos Alternatives Management**, New York, NY

**\$253mm** discretionary OCIO assets

\$5.4bn total AUM

Anne Casscells, Co-Founder, Co-President, CIO

Michael Klein, Co-Founder, Co-President, CRO

John Stimpson, MD, Co-Head of Client Relations & Business Development

[jstimpson@aetos.com](mailto:jstimpson@aetos.com)

(212) 201-2560

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### 3. **Agility**, Denver, CO

**\$15bn** discretionary assets

Chris Bittman, Partner

[cbittman@agilitycio.com](mailto:cbittman@agilitycio.com)

(303) 813-7910

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### 4. **Alan Biller and Associates**, Menlo Park, CA

**\$72.4bn** discretionary assets

\$132.1bn total

Alan D. Biller, Chairman

Jennifer Newell, CEO

[info@alanbiller.com](mailto:info@alanbiller.com)

(650) 328-7283

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### 5. **Alesco Advisors**, Pittsford, NY

**\$4.4bn** discretionary assets

\$5.4bn total

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

[TGreen@alescoadvisors.com](mailto:TGreen@alescoadvisors.com)

(585) 586-0970 Office

(585) 749-0357 Cell

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

**\$6.4bn** discretionary assets

\$42.1bn total

Garry Duncan, Managing Director, Head of Client Development

[gduncan@angelesinvestments.com](mailto:gduncan@angelesinvestments.com)

(310) 857-5825

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**7. AON, Chicago, IL**

**\$155bn** Global discretionary assets

\$4.359 trillion global advisory (6-30-23)

Dave Keil, Partner, Head of Sales & Institution-Directed Solutions

[dave.keil@aon.com](mailto:dave.keil@aon.com)

(847) 309-9558

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

**\$754 mil** total

Susan Webb, Founder, CEO & CIO

Drienne Benner, Managing Director

[dbenner@appomattox.com](mailto:dbenner@appomattox.com)

(212) 895-3000

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

**\$1.02bn** discretionary assets

\$1.6bn total

Peter M. Rup, Founder & CIO

[prup@artemiswa.com](mailto:prup@artemiswa.com)

Ron Zdrojeski, Director Business Development

(212) 838-9000

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**10. Asset Consulting Group, St. Louis, MO**

**\$614mm** discretionary assets

\$176bn total

George A. Tarlas, Senior Managing Director

[george.tarlas@acgnet.com](mailto:george.tarlas@acgnet.com)

(314) 862-4848

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**11. Asset Strategy Consultants, Baltimore, MD**

**\$2bn** discretionary assets

Andrew W. Conner, CIO

[conner@assetstrategyconsultants.com](mailto:conner@assetstrategyconsultants.com)

Juan Buendia, Senior Client Advisor

[buendia@assetstrategyconsultants.com](mailto:buendia@assetstrategyconsultants.com)

(410) 528-8282

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**12. Atlas Capital Advisors**, San Francisco, CA

**\$822mm** discretionary assets

**\$909mm** total

Ken Frier, Chief Investment Officer

[ken@atlasca.com](mailto:ken@atlasca.com)

Leslie Krampert, Managing Director

[leslie@atlasca.com](mailto:leslie@atlasca.com)

(415) 689-1109

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**13. Bank of America**, New York, NY

**\$91.1bn** Institutional discretionary assets

**\$1.6trillion** total managed assets

Bernard Reidy, Managing Director, National  
Endowment and Foundations Executive

[bernard.reidy@bofa.com](mailto:bernard.reidy@bofa.com)

(203) 571-5341

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**14. BBR Partners**, New York, NY

**\$25.7bn** discretionary assets

**\$28bn** total

Todd Whitenack, Co-Managing Partner

[twhitenack@bbrpartners.com](mailto:twhitenack@bbrpartners.com)

(212) 313-9875

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**15. BlackRock**, New York, NY

**\$319bn** Global discretionary asset

John Simpson, Managing Director, Head of OCIO for Americas  
within Multi-Asset Strategies & Solutions (MASS)

[john.simpson@blackrock.com](mailto:john.simpson@blackrock.com)

(212) 810-3683

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**16. Blue Edge Capital**, Richmond, VA

**\$650mm** discretionary assets

**\$650mm** total

Peter H. Bowles, Managing Director

[pbowles@blueedgecap.com](mailto:pbowles@blueedgecap.com)

(804) 673-7404

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**17. BNY Mellon Advisors, Inc.**, Pennington, NJ

**\$8.3bn** discretionary assets  
\$166.5bn total  
Girish Massand, Institutional Solutions Strategist  
[girish.massand@bnymellon.com](mailto:girish.massand@bnymellon.com)  
(212) 635-6438

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**18. Bridges Trust**, Omaha, NE  
**\$9.6bn** AUM  
Nick Wilwerding, President  
[nwilwerding@bridgestrust.com](mailto:nwilwerding@bridgestrust.com)  
Jack Holmes, Senior Vice President  
[jholmes@bridgestrust.com](mailto:jholmes@bridgestrust.com)  
(402) 393-8300

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**19. Brockenbrough**, Richmond, VA  
**\$1.6bn** OCIO discretionary assets  
\$3.9bn total  
Wesley Carroccio, Managing Director, Strategic Initiatives  
[wcarroccio@brockenbroughinc.com](mailto:wcarroccio@brockenbroughinc.com)  
(610) 659-9168

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**20. Brown Advisory**, Baltimore, MD  
**\$5.6bn** OCIO discretionary assets  
\$15bn Total discretionary assets AUM  
Brigid Peterson, Head Endowment & Foundations  
[bpeterson@brownadvisory.com](mailto:bpeterson@brownadvisory.com)  
(410) 537-5379

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**21. Brown Brothers Harriman**, New York, NY  
**\$56.2bn** Total discretionary assets  
Tom Davis, Partner  
[thomas.davis@bbh.com](mailto:thomas.davis@bbh.com)  
(212) 493-8699

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**22. Callan**, San Francisco, CA  
**\$34.2bn** discretionary assets  
\$4.5 trillion advisory  
James A. Callahan, President  
[callahan@callan.com](mailto:callahan@callan.com)  
Mark Andersen, Head of Trust Advisory Group  
[andersen@callan.com](mailto:andersen@callan.com)  
(415) 974-5060

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**23. Cambridge Associates**, Boston, MA  
**\$72.4bn** discretionary assets

\$568.1bn advisory  
Krista Matthews, Managing Director  
[kmatthews@cambridgeassociates.com](mailto:kmatthews@cambridgeassociates.com)  
(617) 457-1781

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24. **Canterbury Consulting**, Newport Beach, CA  
\$3bn discretionary assets  
\$31.6bn advisory  
Robinson (Bob) Cluck, Chairman  
[bcluck@canterburyconsulting.com](mailto:bcluck@canterburyconsulting.com)  
(949) 718-2229  
Poorvi Parekh, Director OCIO  
[pparekh@canterburyconsulting.com](mailto:pparekh@canterburyconsulting.com)  
(949) 718-2224

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25. **Capricorn Investment Group**, New York, NY  
\$5.8bn discretionary assets  
\$9.4bn total  
Kunle Apampa, Head of Client Advisory & Partnerships  
[kapampa@capricornllc.com](mailto:kapampa@capricornllc.com)  
(646) 289-3031

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26. **CAPTRUST**, Raleigh, NC  
\$169.8bn discretionary assets  
\$730.8bn advisory  
Greg Middleton, Senior Director Marketing  
[greg.middleton@captrust.com](mailto:greg.middleton@captrust.com)  
(919) 278-9814

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27. **Cerity Partners**, W. Conshohocken, PA  
\$61.85bn discretionary assets  
Mimi Drake, Partner, Co-Market Leader  
[mdrake@ceritypartners.com](mailto:m Drake@ceritypartners.com)  
(610) 834-5873  
Bill Curran, Partner  
[bcurran@ceritypartners.com](mailto:bcurran@ceritypartners.com)  
(610) 940-5331

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28. **Clearbrook Global Advisors**, New York, NY  
\$1.5bn discretionary assets  
\$11bn advisory  
Elliott Wislar, CEO  
[ewislar@clrbrk.com](mailto:ewislar@clrbrk.com)  
Gregg Sibert, Chief Marketing Officer  
[gsibert@clrbrk.com](mailto:gsibert@clrbrk.com)

(212) 683-6686

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**29. Commonfund**, Wilton, CT  
**\$13.9bn** discretionary OCIO assets  
\$27.6bn total AUM  
Mark Anson, President, CEO & CIO, Commonfund  
Tim Yates, President, CEO & Commonfund OCIO  
[tim.yates@commonfund.org](mailto:tim.yates@commonfund.org)  
(203) 563-5238

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**30. Cornerstone Advisors AM**, Bethlehem, PA  
**\$3.5bn** discretionary assets  
\$7.4bn total  
J.P. Cavaliere, Senior Consultant  
[jcavaliere@cornerstone-companies.com](mailto:jcavaliere@cornerstone-companies.com)  
(610) 694-0900 (o)  
(484) 941-2685 (c)

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**31. CornerStone Partners**, Charlottesville, VA  
**\$18.65bn** discretionary assets  
\$20.03bn total  
Mike Pagliaro, Director  
[mpagliaro@cstonellc.com](mailto:mpagliaro@cstonellc.com)  
(610) 290-6660

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**32. Cornerstone Portfolio Research**, Chester Springs, PA  
**\$1.3bn** discretionary assets  
\$3.4bn total  
Thomas Balis, President and CIO  
[thomas@cornerstoneportfolioresearch.com](mailto:thomas@cornerstoneportfolioresearch.com)  
(484) 631-3684

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**33. Crewcial Partners**, New York, NY  
**\$1.6bn** discretionary assets  
\$31.4bn advisory  
Charlie Georgalas, Managing Director  
[cgc@crewcialpartners.com](mailto:cgc@crewcialpartners.com)  
(212) 218-4900

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**34. Disciplina**, Nashville, TN  
**\$2.3bn** discretionary assets  
Matthew W. Wright, President & CIO  
[mww@disciplina.com](mailto:mww@disciplina.com)  
(615) 490-6002  
Brian Arsenault, Managing Director

[brian@disciplina.com](mailto:brian@disciplina.com)

(615) 490-8586

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**35. Evoke Advisors**, Los Angeles, CA

**\$10bn** discretionary assets

\$25bn advisory

Damien Bisserier, Managing Partner, Co-CIO

[dbisserier@evokeadvisors.com](mailto:dbisserier@evokeadvisors.com)

(424) 283-3802

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**36. FEG Investment Advisors**, Cincinnati, OH

**\$11.7bn** discretionary assets

\$77.7bn advisory

Alan Lenahan, CEO

Wess McKeown, Institutional Client Development

[wmckeown@feg.com](mailto:wmckeown@feg.com)

(513) 719-5053

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**37. Fidelity Institutional**, Boston, MA

**\$18bn** OCIO Advisory Solutions

Eric Lussen, SVP, Endowments & Foundations

[eric.lussen@fmr.com](mailto:eric.lussen@fmr.com)

(312) 343-4408 Office

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

[danielle.frissell@fmr.com](mailto:danielle.frissell@fmr.com)

(401) 292-3452 Office

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**38. Fiduciary Trust International**, New York, NY

**\$8.964bn** discretionary assets

\$37.63bn total

Ronald Sanchez, CIO

[rsanchez@ftci.com](mailto:rsanchez@ftci.com)

Kate Huntington, Head of Advisory Solutions Group

[kate.huntington@ftci.com](mailto:kate.huntington@ftci.com)

(877) 384-1111

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**39. Fiduciary Wealth Partners**, Boston, MA

**\$1.3bn** discretionary assets

\$2.0bn total AUM and AUA

Preston McSwain, Managing Partner

[preston@fwp.partners](mailto:preston@fwp.partners)

(617) 602-1901

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**40. Fiducient Advisors**, Chicago, IL

**\$22.1bn** discretionary assets

\$309bn advisory

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

[mchase@fiducient.com](mailto:mchase@fiducient.com)

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

[mporter@fiducient.com](mailto:mporter@fiducient.com)

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41. **F.L. Putnam IMC**, Lynnfield, MA

**\$6.5bn** investment advisory assets under management

\$2.1bn consulting assets under advisory

\$8.6bn total assets under advisory

Chris McVey, Director of Business Development

[cmcvey@flputnam.com](mailto:cmcvey@flputnam.com)

(781) 591-8265

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42. **Gallagher Fiduciary Advisors**, Washington, DC

**\$7.5bn** discretionary assets

\$58.19bn advisory

Michael Johnson, President

[michael\\_w\\_johnson@ajg.com](mailto:michael_w_johnson@ajg.com)

Phil Fabrizio, Area Director

(202) 898-2270

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43. **Gerber Taylor**, Memphis, TN

**\$7.2bn** discretionary assets

\$6.6bn advisory

Charles Gerber, President

[cgerber@gerbertaylor.com](mailto:cgerber@gerbertaylor.com)

Matthew Kinnear, Client Development

[mkinnear@gerbertaylor.com](mailto:mkinnear@gerbertaylor.com)

(901) 526-9750

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44. **Glenmede**, Philadelphia, PA

**\$10.9bn** Tax-exempt OCIO assets

\$44.2bn total

Adam M. Conish, Director of Endowment & Foundation Management

[adam.conish@glenmede.com](mailto:adam.conish@glenmede.com)

(215) 419-6676

Jerrold Charles, VP & Business Development Director

[jerrol.charles@glenmede.com](mailto:jerrol.charles@glenmede.com)

(917) 501-0241

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45. **Global Endowment Management**, Charlotte, NC

**\$12bn** discretionary assets

Stephanie Lynch, Managing Partner



[slynch@globalendowment.com](mailto:slynch@globalendowment.com)

(704) 333-8282

Matt Bank, Partner

[mbank@globalendowment.com](mailto:mbank@globalendowment.com)

(704) 370-1686

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**46. Global Strategic Investment Solutions**, Scottsdale, AZ

**\$1.4bn** discretionary assets

Don Callaghan, Managing Partner

[dcallaghan@gsisus.com](mailto:dcallaghan@gsisus.com)

(215) 919-3116

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**47. Goldman Sachs**, New York, NY

**\$329.4bn** discretionary assets

\$2.8 trillion total

Timothy Braude, Managing Director

[timothy.braude@gs.com](mailto:timothy.braude@gs.com)

(917) 343-2138

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**48. Hall Capital Partners**, San Francisco, CA

**\$17.2bn** discretionary assets

\$43.5bn total

Simon Krinsky, Managing Partner

[skrinsky@hallcapital.com](mailto:skrinsky@hallcapital.com)

(212) 407-0707

Krista Smith, Business Development Associate

[ksmith@hallcapital.com](mailto:ksmith@hallcapital.com)

(415) 277-2624

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**49. Harpswell Capital Advisors**, New Gloucester/Portland, ME

**\$481mm** discretionary assets (small endowments, \$3-\$60mm)

\$580mm advisory

Jack Moore, Managing Partner & CIO

Vanessa M. Bryant, COO

[jpm@harpswelladvisors.com](mailto:jpm@harpswelladvisors.com)

[vmb@harpswelladvisors.com](mailto:vmb@harpswelladvisors.com)

(877) 427-7227

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**50. Highland Associates**, Birmingham, AL

**\$14.4bn** discretionary assets

\$14.4bn AUA

Trey Echols, CEO

Courtney Crane, Marketing & Sales Development Partner

[ccrane@highlandassoc.com](mailto:crcrane@highlandassoc.com)

(205) 939-8664

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**51. Hirtle Callaghan**, W. Conshohocken, PA  
**\$19.6bn** discretionary assets  
Garrett Wilson, Managing Director (Institutions)  
[gwilson@hirtle.com](mailto:gwilson@hirtle.com)  
Susan McEvoy, Managing Director (Families)  
[smcevoy@hirtle.com](mailto:smcevoy@hirtle.com)  
(610) 943-4100

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**52. Holt CIO**, Fort Worth, TX  
**\$425mm** Total  
Robert M. Holt, Jr., Managing Partner  
[rholt@holtcap.com](mailto:rholt@holtcap.com)  
(817) 877-1430

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**53. ICG Advisors**, Los Angeles, CA  
**\$7.6bn** Total assets  
J. Jeffrey Assaf, Sr. Managing Director & CIO  
[jassaf@icgadvisors.com](mailto:jassaf@icgadvisors.com)  
(424) 270-8900

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

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**55. J.P. Morgan Asset & Wealth Management**, New York, NY  
**\$164.2bn** OCIO discretionary assets  
**\$3.4 trillion** total  
Monica Issar, Global Head Multi-Asset  
& Portfolio Solutions  
[monica.issar@jpmorgan.com](mailto:monica.issar@jpmorgan.com)  
(212) 464-2852

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**56. Lazard Family Office Partners**, New York, NY  
**\$8.3bn** Total  
Casey D. Whalen, Head and Chief Investment Officer  
[casey.whelen@lazard.com](mailto:casey.whelen@lazard.com)  
(212) 287-2970

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**57. LCG Associates**, Atlanta, GA

**\$2.0bn** discretionary assets  
\$111bn advisory  
Christopher Philips, SVP, OCIO Practice Leader  
[cphilips@lcgassociates.com](mailto:cphilips@lcgassociates.com)  
(770) 644-0100

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**58. Makena**, Menlo Park, CA  
**\$20bn** discretionary assets  
Joseph Magher, Managing Director  
[jmagher@makenacap.com](mailto:jmagher@makenacap.com)  
(650) 926-1339

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**59. Marquette Associates**, Chicago, IL  
**\$15.1bn** discretionary assets  
\$366.5bn advisory  
Brian Wrubel, CEO  
[bwrubel@marquetteassociates.com](mailto:bwrubel@marquetteassociates.com)  
Nat Kellogg, President  
[nkellogg@marquetteassociates.com](mailto:nkellogg@marquetteassociates.com)  
(312) 527-5500

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**60. Meketa Investment Group**, San Diego, CA  
**\$26bn** discretionary assets  
\$1.9 trillion advisory  
Lisa Rubin, Director of Marketing  
[lrubin@meketa.com](mailto:lrubin@meketa.com)  
(760) 795-3450

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**61. Mercer**, New York, NY  
**\$420bn** global discretionary  
\$16 trillion plus, advisory  
Sylvia Diez, US Investment Sales Leader  
[sylvia.diez@mercer.com](mailto:sylvia.diez@mercer.com)  
(412) 515-7738

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**62. Mill Creek Capital Advisors**, Conshohocken, PA  
**\$9.75bn** discretionary assets  
\$10.2bn total  
Josh Gross, CEO  
[jgross@millcreekcap.com](mailto:jgross@millcreekcap.com)  
(610) 941-7714

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**63. Miller Investment Management**, West Conshohocken, PA  
**\$1.7bn** discretionary assets  
\$4.6bn non-discretion

Timothy P. Letter, Managing Director, business development  
[tletter@millerinv.com](mailto:tletter@millerinv.com)  
(610) 834-9820 x136

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**64. Morgan Creek Capital Management**, Chapel Hill, NC  
**\$2.5bn** discretionary assets  
Mark Yusko, CEO & CIO  
[myusko@morgancreekap.com](mailto:myusko@morgancreekap.com)  
(919) 933-4004  
[pclark@morgancreekap.com](mailto:pclark@morgancreekap.com)

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**65. Morgan Stanley OCIO/Graystone Consulting**, New York, NY  
**\$182.1bn** OCIO discretionary assets  
General OCIO Inquiries  
[msocio@morganstanley.com](mailto:msocio@morganstanley.com)  
(212) 296-7735  
Lisa Shalett, Managing Director, CIO and Chair, Global Investment Committee  
[lisa.shalett@morganstanley.com](mailto:lisa.shalett@morganstanley.com)  
(212) 296-0335  
Robert Mandel, Managing Director, Head of Graystone Business & Team Development  
[robert.j.mandel@morganstanley.com](mailto:robert.j.mandel@morganstanley.com)  
(914) 225-5420

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**66. Multilateral Endowment Management Co.,**  
“MEMCO,” Edmond, OK  
**\$1.3bn** discretionary assets  
\$2.7 total  
Ryan Harms, CIO  
[rharms@memco-invest.com](mailto:rharms@memco-invest.com)  
(405) 334-6588  
Ashley Roche COO & General Counsel  
[aroche@memco-invest.com](mailto:aroche@memco-invest.com)  
405-714-7827

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**67. Natixis Investment Managers Solutions**, Boston, MA  
**\$6.46bn** OCIO discretionary assets  
\$1.3 trillion total firm AUM  
Devin Griffin, VP Consultant Relations  
[devin.griffin@natixis.com](mailto:devin.griffin@natixis.com)  
(617) 449-2633

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**68. NEPC**, Boston, MA  
**\$99.0bn** discretionary assets  
\$1.6 trillion total  
Steve Charlton, Head of Client Solutions

[scharlton@nepc.com](mailto:scharlton@nepc.com)

(617) 374-1300

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**69. Northern Trust, Chicago, IL**

**\$94.6bn** OCIO discretionary assets

\$53.3bn advisory

\$1.4 total managed assets

Lyndsay Ferencak, Director Senior OCIO Specialist

[LRF4@ntrs.com](mailto:LRF4@ntrs.com)

(312) 444-3297

Darius Gill, National Practice Director

[DAG9@ntrs.com](mailto:DAG9@ntrs.com)

(312) 444-7153

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**70. Partners Capital Investment Group, Boston & London**

**\$55.2bn** Total

Leslie (Ahlstrand) Fitzgerald, Managing Director

[leslie.fitzgerald@partners-cap.com](mailto:leslie.fitzgerald@partners-cap.com)

(617) 778-7046

Cathleen Lawless, Business Development Senior Associate

[cathleen.lawless@partners-cap.com](mailto:cathleen.lawless@partners-cap.com)

(617) 292-1936

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**71. PermCap Investment Office, Charleston, SC**

**\$4.5bn** discretionary assets

John Regan, Founding Partner & CIO

[jr@permcap.com](mailto:jr@permcap.com)

(843) 882-7955

Connor Carew, Partner

[connor@permcap.com](mailto:connor@permcap.com)

(212) 993-7449

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**72. PFM Asset Management, Philadelphia, PA**

**\$27.6bn** discretionary assets

\$225.5bn Total

Jim Link, Managing Director

[linkj@pfmam.com](mailto:linkj@pfmam.com)

John Spagnola, Managing Director

[spagnolaj@pfmam.com](mailto:spagnolaj@pfmam.com)

(215) 557-1222

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**73. Pivotal Advisors, New York, NY**

**\$420mm** discretionary assets

Tiffany McGhee, CEO & CIO

[tiffany@pivotal-advisors.com](mailto:tiffany@pivotal-advisors.com)

(646) 535-1097

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**74. PNC Bank**, Philadelphia, PA  
**\$71.7bn** discretionary assets  
Chris McGoldrick, Head of OCIO  
[chris.mcgoldrick@pnc.com](mailto:chris.mcgoldrick@pnc.com)  
(610) 764-4780

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**75. Prime Buchholz & Associates**, Portsmouth, NH  
**\$4.9bn** discretionary assets  
\$73.5bn advisory  
William F. McCarron, President  
[bmc@primebuchholz.com](mailto:bmc@primebuchholz.com)  
(603) 433-1143

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**76. Principal Asset Management**, Des Moines, IA  
**\$24.1bn** OCIO discretionary assets  
\$500bn total AUM  
Joe McCarty, VP, Retiree Services Group  
[mccarty.joe@principal.com](mailto:mccarty.joe@principal.com)  
(515) 248-2609

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**77. Prodigy Asset Management**, Omaha, NE  
**\$3.5bn** discretionary assets  
Arnaldo Ovalles, Partner  
[arnaldo.ovalles@prodigyllc.com](mailto:arnaldo.ovalles@prodigyllc.com)  
(402) 502-3231

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**78. Regions Asset Management**, Birmingham, AL  
**\$55.7bn** discretionary assets  
S. Alan McKnight, Jr., CIO  
[alan.mcknight@regions.com](mailto:alan.mcknight@regions.com)  
(917) 822-3412

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**79. RiskBridge Advisors**, New Canaan, CT  
**\$633mm** discretionary assets  
\$85bn advisory  
William Kennedy, CEO and CIO  
[bkennedy@riskbridgeadvisors.com](mailto:bkennedy@riskbridgeadvisors.com)  
(203) 658-6055

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**80. RockCreek**, Washington, D.C.  
**\$5.5bn** OCIO assets  
\$16.4bn total  
Afsaneh Beschloss, President and CEO

[clientservices@therockcreekgroup.com](mailto:clientservices@therockcreekgroup.com)  
(202) 331-3400

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**81. Russell Investments**, Seattle, WA

**\$243.2bn** discretionary assets

Lindy Freeman, Managing Director, Head of Americas Institutional

[lfreeman@russellinvestments.com](mailto:lfreeman@russellinvestments.com)

(206) 505-1994

Graham Seagraves, Managing Director, Head of Americas Institutional Solutions

[gseagraves@russellinvestments.com](mailto:gseagraves@russellinvestments.com)

(704) 374-9985

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**82. SEI Institutional Group**, Oaks, PA

**\$193.5bn** discretionary assets

Michael Cagnina, SVP, Managing Director

[mcagnina@seic.com](mailto:mcagnina@seic.com)

(610) 676-1496

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**83. Sellwood Consulting**, Portland, OR

**\$1.5bn** discretionary assets

**\$8.5bn** total

Ashlee Moehring, Consultant, Principal

[ashleemoehring@sellwoodconsulting.com](mailto:ashleemoehring@sellwoodconsulting.com)

(503) 596-2880

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**84. Seven Bridges Advisors**, New York, NY

**\$5.5bn** Total

Ram Lee, Partner & CIO

[ramlee@sevenbridgesadvisors.com](mailto:ramlee@sevenbridgesadvisors.com)

(212) 490-6320

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**85. Silvercrest Asset Management**, New York, NY

**\$21.9bn** discretionary assets

**\$33.3bn** total

Chris Long, Director Endowment & Foundation Investment Solutions

[clong@silvercrestgroup.com](mailto:clong@silvercrestgroup.com)

(212) 649-0697

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**86. Spider Management Company**, Richmond, VA

**\$5.9bn** discretionary assets

William H. McLean, President and CIO

[wmclean2@richmond.edu](mailto:wmclean2@richmond.edu)

Rebecca Fender, Director of Investor Relations

[rfender@richmond.edu](mailto:rfender@richmond.edu)

(804) 200-6901

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**87. State Street Global Advisors, Boston, MA**

**\$157bn** discretionary assets

Jack Serhant, Head of Solutions Distribution

[Jack\\_Serhant@ssga.com](mailto:Jack_Serhant@ssga.com)

(617) 664-4599

Rob Spencer, Head of investment strategy

[Robert\\_Spencer@ssga.com](mailto:Robert_Spencer@ssga.com)

(617) 664-9489  
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**88. Strategic Investment Group, Arlington, VA**

**\$27.4bn** discretionary assets

\$27.6bn total AUM

Nikki Kraus, President & Chief Client Officer

[nkraus@strategicgroup.com](mailto:nkraus@strategicgroup.com)

(703) 243-4433  
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**89. Summit Rock Advisors, New York, NY**

**\$21bn** discretionary assets (avg. client \$425MM)

David Dechman, CEO & co-Founder

[david.dechman@summit-rock.com](mailto:david.dechman@summit-rock.com)

(212) 993-7150  
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**90. Syntrinsic, Denver, CO**

**\$2.05bn** discretionary assets

\$2.5bn total

Jim Brauer, Managing Director

[jim.brauer@syntrinsic.com](mailto:jim.brauer@syntrinsic.com)

(303) 518-6370  
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**91. The Colony Group, New York, NY**

**\$4.2bn** discretionary assets

\$22bn total

Andrew W. Vogelstein, President, Institutional Advisory Practice

Sarah Withers, Associate Director

[swithers@thecolonygroup.com](mailto:swithers@thecolonygroup.com)

(646) 292-1272  
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**92. The Family Office at Synovus, Columbus, GA**

**\$8.3bn** discretionary assets

\$10.3bn AUA

Katherine Dunlevie, President and CEO

[katherinedunlevie@synovus.com](mailto:katherinedunlevie@synovus.com)

(706) 641-3997

Mike Sluder, CIO



[michaelsluder@synovus.com](mailto:michaelsluder@synovus.com)  
(706) 644-2063

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**93. TIFF Investment Management**, Radnor, PA  
**\$8bn** discretionary assets  
Kane Brenan, CEO  
Jessica Portis, Chief Client Officer  
[jportis@tiff.org](mailto:jportis@tiff.org)  
(314) 240-0407

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**94. Torreyana Capital**, La Jolla, CA  
**\$1bn** discretionary assets  
Kris Ostrander, CEO  
[kostrander@torreyanacapital.com](mailto:kostrander@torreyanacapital.com)  
(510) 410-1230

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**95. Truist Bank**, Atlanta, GA  
**\$16.5bn** discretionary assets  
Stephen Yarbrough, Foundations & Endowments Specialty Practice  
[Stephen.yarbrough@truist.com](mailto:Stephen.yarbrough@truist.com)  
(404) 788-4401

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**96. UBS AG**, Chicago, IL  
**\$16.1bn** OCIO discretionary assets  
Mohammad Ahmad, Head, Business Development  
[mohammad.ahmad@ubs.com](mailto:mohammad.ahmad@ubs.com)  
41 79 629 48 29  
Waiting for a post-merger update  
Dale Kindregan, ExecDir E&Fs?

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**97. Verger Capital Management**, Winston-Salem, NC  
**\$2.8bn** discretionary assets  
Michael Collins, Managing Director  
[mcollins@vergercapital.com](mailto:mcollins@vergercapital.com)  
(336) 934-4101

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**98. Verus Advisory**, Seattle, WA  
**\$8.6bn** discretionary assets  
\$1.1trillion advisory  
Shelly J. Heier, President & Senior consultant  
[sheier@verusinvestments.com](mailto:sheier@verusinvestments.com)  
(206) 622-3700

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**99. Wespeth Institutional**, Glenview, IL  
**\$5bn** discretionary assets

T. Joseph Halwax, Managing Director Institutional Services  
[jhalwax@wespath.org](mailto:jhalwax@wespath.org)  
(847) 866-4307

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**100. Willis Towers Watson**, Chicago, IL  
**\$162bn** discretionary assets  
Nimisha Srivastava, Head of Investments, North America  
[nimisha.srivastava@wtwco.com](mailto:nimisha.srivastava@wtwco.com)  
(704) 806-1652  
Mark Calnan, Head of Investments, Europe  
[mark.calnan@wtwco.com](mailto:mark.calnan@wtwco.com)  
44 (0) 207 170 2819

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**101. Wilmington Trust**, Wilmington, DE  
**\$78.7bn** discretionary assets  
Patrick Decker, Head of Institutional OCIO  
[pdecker1@wilmingtontrust.com](mailto:pdecker1@wilmingtontrust.com)  
(610) 773-6120

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**102. Wilshire Advisors**, Santa Monica, CA  
**\$121bn** discretionary OCIO assets  
\$1.4 trillion advisory  
Leah Emkin, Chief Client Officer  
[lemkin@wilshire.com](mailto:lemkin@wilshire.com)  
(310) 260-6689

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**102 Firms - \$4.1 Trillion AUM**