

# Outsourced Chief Investment Officer (OCIO) Directory, fall 2024

## Charles Skorina & Company

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

Office: 520-428-4180

(AUM as of June 30, 2024, unless otherwise noted)

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

**\$888mm** total

Mary L. Cahill, CEO & CIO

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

(703) 639-1888

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

**\$278mm** discretionary assets

**\$5.1bn** total

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

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

**\$57.9bn** discretionary assets

**\$152.8bn** total

Alan D. Biller, Chairman

Jennifer Newell, CEO

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

(650) 328-7283

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

**\$4.6bn** discretionary assets

**\$5.5bn** total

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

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

(585) 586-0970 Office

(585) 749-0357 Cell

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

**\$6.4bn** discretionary assets

**\$38.7bn** total

Garry Duncan, Managing Director, Head of Client Development

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

(310) 857-5825

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**6. AON**, Chicago, IL

**\$189bn** global discretionary assets

**\$4.303** trillion global advisory

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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**7. 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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**8. 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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**9. Bank of America**, New York, NY

**\$97.8bn** institutional discretionary assets

**\$1.8** trillion 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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**10. BBR Partners**, New York, NY

**\$27.5bn** discretionary assets

**\$29.7bn** total

Todd Whitenack, Co-Managing Partner

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

(212) 313-9875

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**11. BlackRock**, New York, NY

**\$333bn** 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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**12. Blue Edge Capital**, Richmond, VA  
**\$700mm** discretionary assets  
**\$750mm** total  
Peter H. Bowles, Managing Director  
[pbowles@blueedgecap.com](mailto:pbowles@blueedgecap.com)  
(804) 673-7404

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**13. BNY Advisors, Inc.**, Pennington, NJ  
**\$7.1bn** discretionary assets  
**\$172.6bn** total  
Girish Massand, Institutional Solutions Strategist  
[girish.massand@bnymellon.com](mailto:girish.massand@bnymellon.com)  
(212) 635-6438

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**14. Bridges Trust**, Omaha, NE  
**\$10.6bn** discretionary assets  
Nick Wilwerding, CEO  
[nwilwerding@bridgestrust.com](mailto:nwilwerding@bridgestrust.com)  
Jack Holmes, CIO  
[jholmes@bridgestrust.com](mailto:jholmes@bridgestrust.com)  
(402) 393-8300

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**15. Brockenbrough**, Richmond, VA  
**\$1.7bn** discretionary OCIO assets  
**\$4.1bn** total  
Wesley Carroccio, Managing Director, Strategic Initiatives  
[wcarroccio@brockenbroughinc.com](mailto:wcarroccio@brockenbroughinc.com)  
(610) 659-9168

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**16. Brown Advisory**, Baltimore, MD  
**\$6.1bn** discretionary OCIO assets  
**\$15.3bn** total discretionary assets  
Brigid Peterson, Head Endowment & Foundations  
[bpeterson@brownadvisory.com](mailto:bpeterson@brownadvisory.com)  
(410) 537-5379

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**17. Brown Brothers Harriman**, New York, NY  
**\$57.0bn** discretionary assets  
Tom Davis, Partner

[thomas.davis@bbh.com](mailto:thomas.davis@bbh.com)  
(212) 493-8699

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**18. Callan**, San Francisco, CA  
**\$46.7bn** discretionary assets  
\$4.9 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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**19. Cambridge Associates**, Boston, MA  
**\$74.6bn** discretionary assets  
\$590bn advisory  
Krista Matthews, Managing Director  
[kmatthews@cambridgeassociates.com](mailto:kmatthews@cambridgeassociates.com)  
(617) 457-1781

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**20. Canterbury Consulting**, Newport Beach, CA  
**\$3.2bn** discretionary assets  
\$37.3bn advisory  
D. 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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**21. Capricorn Investment Group**, New York, NY  
**\$6.0bn** discretionary assets  
\$10.0bn total  
Kunle Apampa, Head of Client Solutions  
[kapampa@capricornllc.com](mailto:kapampa@capricornllc.com)  
(646) 289-3031

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**22. CAPTRUST**, Raleigh, NC  
**\$209bn** discretionary assets  
\$783bn advisory  
Greg Middleton, Senior Director Marketing  
[greg.middleton@captrust.com](mailto:greg.middleton@captrust.com)  
(919) 278-9814

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**23. Cerity Partners OCIO (formerly Agility)**, Denver, CO  
**\$17.5bn** discretionary assets

Chris Bittman, Partner  
[cbittman@ceritypartners.com](mailto:cbittman@ceritypartners.com)  
(303) 813-7910

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24. **Citi**, New York, NY  
**\$18.5bn** discretionary assets  
\$137bn total  
John Anderson, Managing Director, Head of Institutional Investment Strategies  
[john.anderson@citi.com](mailto:john.anderson@citi.com)  
(212) 559-8881  
Ryan Robinson, Managing Director, North America Team Lead  
[ryan.robinson@citi.com](mailto:ryan.robinson@citi.com)  
(813) 604-7152

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25. **Clearbrook Global Advisors**, New York, NY  
**\$1.5bn** discretionary assets  
\$11bn advisory assets  
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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26. **Commonfund**, Wilton, CT  
**\$15.3bn** discretionary OCIO assets  
\$28.4bn total  
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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27. **Cornerstone Advisors AM**, Bethlehem, PA  
**\$4bn** discretionary assets  
\$7.9bn 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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28. **CornerStone Partners**, Charlottesville, VA  
**\$21.1bn** discretionary assets  
\$22.55bn total  
Mike Pagliaro, Director  
[mpagliaro@cstonellc.com](mailto:mpagliaro@cstonellc.com)  
(610) 290-6660

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**29. Cornerstone Portfolio Research, Chester Springs, PA**

**\$1.3bn** discretionary assets

**\$3.5bn** total

**Thomas Balis, President and CIO**

[thomas@cornerstoneportfolioresearch.com](mailto:thomas@cornerstoneportfolioresearch.com)

(484) 631-3684

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**30. Courier Capital, Buffalo, NY**

**\$500mm** discretionary assets

**\$3bn** total

**James E. Iglewski, President**

[jeiglewski@couriercapital.com](mailto:jeiglewski@couriercapital.com)

(716) 883-9595

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**31. Crewcial Partners, New York, NY**

**\$2.0bn** discretionary assets

**\$28.2bn** advisory

**Charlie Georgalas, Managing Director**

[cgc@crewcialpartners.com](mailto:cgc@crewcialpartners.com)

(212) 218-4900

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**32. Disciplina, Nashville, TN**

**\$2.4bn** 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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**33. 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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**34. FEG Investment Advisors, Cincinnati, OH**

**\$12.4bn** discretionary assets

**\$69.8bn** advisory

**Alan Lenahan, CEO**

**Devinne Verst, Head of Client Development**

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

**Wess McKeown, Institutional Client Development**

[wmckeown@feg.com](mailto:wmckeown@feg.com)  
(513) 977-4400

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**35. Fidelity Institutional**, Boston, MA

**\$19.58bn** 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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**36. Fiduciary Trust International**, New York, NY

**\$9.14bn** discretionary assets

**\$38.84bn** 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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**37. Fiduciary Wealth Partners**, Boston, MA

**\$1.3bn** discretionary assets

**\$2.0bn** total

Preston McSwain, Managing Partner

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

(617) 602-1901

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**38. Fiducient Advisors**, Chicago, IL

**\$27.7bn** discretionary assets

**\$305.5bn** advisory

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

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

Matt Porter, Managing Partner

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

Sabrina Bailey, CEO

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

(800) 260-5445

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

**\$7.9bn** discretionary assets

**\$10bn** total

Chris McVey, Director of Business Development

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

(781) 591-8265

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

**\$9.84bn** discretionary assets

\$74.81bn advisory

**Michael Johnson, President**

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

**Phil Fabrizio, Area Director**

[phil\\_fabrizio@ajg.com](mailto:phil_fabrizio@ajg.com)

(202) 898-2270

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**41. Gerber Taylor, Memphis, TN**

**\$6.3bn** discretionary assets

\$7.4bn 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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**42. Glenmede, Philadelphia, PA**

**\$10.5bn** tax-exempt OCIO assets

\$45.5bn total

**Adam M. Conish, Director of Endowment & Foundation Management**

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

(215) 419-6676

**Jerrol Charles, VP & Business Development Director**

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

(917) 501-0241

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

**\$12bn** discretionary assets

**Stephanie Lynch, Managing Partner**

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

(704) 333-8282

**Matt Bank, Partner**

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

(704) 370-1686

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

**\$1.6bn** discretionary assets

**Don Callaghan, Managing Partner**

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

(215) 919-3116

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



**\$366.4bn** discretionary assets  
\$2.934 trillion total  
Timothy Braude, Managing Director  
[timothy.braude@gs.com](mailto:timothy.braude@gs.com)  
(917) 343-2138

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**46. Guardian Partners Inc.,** (Guardian Capital Group Ltd) Toronto, ON  
**\$2.78US** (C\$3.8bn) discretionary assets  
\$42.85US (C\$58.6bn) total  
Anthony Messina, Head of Private Wealth  
[amessina@guardiancapital.com](mailto:amessina@guardiancapital.com)  
(647) 980-6989

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**47. Hall Capital Partners,** San Francisco, CA  
**\$17.4bn** discretionary assets  
\$44.0bn total  
Simon Krinsky, Managing Partner  
[skrinsky@hallcapital.com](mailto:skrinsky@hallcapital.com)  
(212) 407-0707  
Krista Smith, Business Development Manager  
[ksmith@hallcapital.com](mailto:ksmith@hallcapital.com)  
(415) 277-2624

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**48. Harpswell Capital Advisors,** New Gloucester/Portland, ME  
**\$500mm** discretionary assets (dedicated to smaller endowments nationwide)  
\$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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**49. HighGround Advisors,** Dallas, TX  
**\$1.5** discretionary assets (small endowments, \$3-\$60mm)  
\$2.8bn advisory  
Steve Thieme, Managing Partner & CIO  
Vanessa M. Bryant, COO  
[stevethieme@gmail.com](mailto:stevethieme@gmail.com)  
(214) 978-3300

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**50. Highland Associates,** Birmingham, AL  
**\$15.18bn** discretionary assets  
\$13.73bn advisory  
\$28.91 total  
Trey Echols, CEO

Courtney Crane, Marketing & Sales Development Partner  
[ccrane@highlandassoc.com](mailto:ccrane@highlandassoc.com)  
(205) 939-8664

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**51. Hirtle Callaghan**, W. Conshohocken, PA  
**\$20.5bn** 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  
**\$7.8bn** total  
J. Jeffrey Assaf, Sr. Managing Director & CIO  
[jassaf@icgadvisors.com](mailto:jassaf@icgadvisors.com)  
(424) 270-8900

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**54. Inatai Investment Management**, Seattle, WA  
**\$2.3bn** discretionary assets  
Peng Wang, CIO  
[w@inatai.partners](mailto:w@inatai.partners)  
Angie Corwin, Project Manager  
[ac@inatai.partners](mailto:ac@inatai.partners)  
(206) 962-2754

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**55. Investure**, Charlottesville, VA  
**\$15bn** discretionary assets  
**\$18bn** 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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**56. J.P. Morgan Asset & Wealth Management**, New York, NY  
**\$179.2bn** discretionary OCIO assets  
**\$3.7 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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**57. 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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**58. LCG Associates**, Atlanta, GA  
**\$2.2bn** discretionary assets  
\$106bn advisory  
Christopher Philips, SVP, OCIO Practice Leader  
[cphilips@lcgassociates.com](mailto:cphilips@lcgassociates.com)  
(770) 644-0100

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**59. 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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**60. Marquette Associates**, Chicago, IL  
**\$26.7bn** discretionary assets  
\$381.2bn 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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**61. McMorgan & Company**, San Francisco, CA  
**\$1.2bn** discretionary assets  
\$7bn total  
Don Palmer, Partner  
[dpalmer@mcmorgan.com](mailto:dpalmer@mcmorgan.com)  
(760) 795-3450

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**62. Meketa Investment Group**, San Diego, CA  
**\$26bn** discretionary assets  
\$2.0 trillion advisory  
Lisa Rubin, Director of Marketing  
[lrubin@meketa.com](mailto:lrubin@meketa.com)  
(760) 795-3450

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**63. Mercer**, New York, NY  
**\$492bn** global discretionary assets  
\$17.5 trillion advisory  
Sylvia Diez, US Investment Sales Leader  
[sylvia.diez@mercer.com](mailto:sylvia.diez@mercer.com)  
(412) 515-7738

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**64. Mill Creek Capital Advisors**, Conshohocken, PA  
**\$10.5bn** discretionary assets  
\$11bn total  
Josh Gross, CEO  
[jgross@millcreekcap.com](mailto:jgross@millcreekcap.com)  
(610) 941-7714

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**65. 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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**66. Morgan Creek Capital Management**, Chapel Hill, NC  
**\$2.5bn** discretionary assets  
Mark Yusko, CEO & CIO  
[myusko@morgancreekcap.com](mailto:myusko@morgancreekcap.com)  
Michael Hennessy, Managing Director  
[mhennessyk@morgancreekcap.com](mailto:mhennessyk@morgancreekcap.com)  
(919) 933-4004

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**67. Morgan Stanley**, New York, NY  
**\$199.6bn** discretionary OCIO 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

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**68. 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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**69. Natixis Investment Managers Solutions, Boston, MA**  
**\$7.47bn** discretionary OCIO assets  
**\$1.3 trillion** total AUM  
Kevin Finney, Managing Director Consultant Relations  
[kevin.finney@natixis.com](mailto:kevin.finney@natixis.com)  
(617) 449-2580

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**70. NEPC, Boston, MA**  
**\$119.8bn** discretionary assets  
**\$1.7 trillion** total  
Steve Charlton, Head of Client Solutions  
[scharlton@nepc.com](mailto:scharlton@nepc.com)  
(617) 374-1300

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**71. Northern Trust, Chicago, IL**  
**\$97.5bn** discretionary OCIO assets  
**\$35.4bn** AUA OCIO advisory  
**\$1.2** total NTAM  
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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**72. Partners Capital Investment Group, Boston & London**  
**\$60.0bn** 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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**73. PermCap Investment Office, Charleston, SC**  
**\$2.6bn** discretionary assets  
**\$4.5bn** total  
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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**74. PFM Asset Management**, Philadelphia, PA  
**\$36.8bn** discretionary assets  
\$252bn 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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**75. Pivotal Advisors**, New York, NY  
**\$430mm** discretionary assets  
Tiffany McGhee, CEO & CIO  
[tiffany@pivotal-advisors.com](mailto:tiffany@pivotal-advisors.com)  
(646) 535-1097

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**76. 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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**77. Point Olema Capital Partners**, San Francisco, CA  
**\$653mm** discretionary assets  
\$1.78bn total  
Eric Upin, Co-Founder & Co-CIO  
[eric@pointolema.com](mailto:eric@pointolema.com)  
John O'Connor, Co-Founder & Co-CIO  
[john@pointolema.com](mailto:john@pointolema.com)  
Nancy Turner, Managing Director, Client Services  
[nancy@pointolema.com](mailto:nancy@pointolema.com)

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**78. Prime Buchholz & Associates**, Portsmouth, NH  
**\$5bn** discretionary assets  
\$72.5bn advisory  
William F. McCarron, President  
[bmc@primebuchholz.com](mailto:bmc@primebuchholz.com)  
(603) 433-1143

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**79. Principal Asset Management**, Des Moines, IA  
**\$24.9bn** discretionary OCIO assets  
\$500bn total

Joe McCarty, VP, Retiree Services Group  
[mccarty.joe@principal.com](mailto:mccarty.joe@principal.com)  
(515) 248-2609

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

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**81. Regions Asset Management**, Birmingham, AL  
**\$60.1bn** discretionary assets  
S. Alan McKnight, Jr., CIO  
[alan.mcknight@regions.com](mailto:alan.mcknight@regions.com)  
(917) 822-3412

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**82. RiskBridge Advisors**, Norwalk, CT  
**\$690mm** discretionary assets  
\$80bn advisory  
William Kennedy, CEO and CIO  
[bkennedy@riskbridgeadvisors.com](mailto:bkennedy@riskbridgeadvisors.com)  
(203) 658-6055

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**83. RockCreek**, Washington, D.C.  
**\$6.2bn** discretionary OCIO assets  
\$17.0bn total  
#Afsaneh Beschloss, President and CEO  
[clientservices@therockcreekgroup.com](mailto:clientservices@therockcreekgroup.com)  
(202) 331-3400

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**84. Russell Investments**, Seattle, WA  
**\$301.5bn** discretionary assets  
Lindy Freeman, Managing Director, Global Head of Institutional  
[lfreeman@russellinvestments.com](mailto:lfreeman@russellinvestments.com)  
(206) 505-1994  
Bikram Chadha, Head of Middle Market Institutional Sales &  
Consultant Relations  
[bchadha@russellinvestments.com](mailto:bchadha@russellinvestments.com)  
(212) 702-7888

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**85. SEI Institutional Group**, Oaks, PA  
**\$197.4bn** discretionary assets  
Michael Cagnina, SVP, Managing Director  
[mcagnina@seic.com](mailto:mcagnina@seic.com)  
(610) 676-1496

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**86. Sellwood Investment Partners, Portland, OR**

\$1.8bn discretionary assets

\$9.3bn total

Ashlee Moehring, Consultant, Principal

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

(503) 596-2880

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**87. 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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**88. Silvercrest Asset Management, New York, NY**

\$21.6bn discretionary assets

\$33.4bn total

Chris Long, Director Endowment & Foundation Investment Solutions

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

(212) 649-0697

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

\$6.0bn 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) 200-6902

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

\$171bn discretionary assets

Jack Serhant, Head of Solutions Distribution

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

(617) 664-4599

Deirdre Brett, Head of OCIO Commercial strategy

[Deirdre\\_Brett@ssga.com](mailto:Deirdre_Brett@ssga.com)

(203) 326-2463

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**91. Strategic Investment Group, Arlington, VA**

\$28.0bn discretionary assets

\$28.2bn total

Nikki Kraus, CEO

Valentina Glaviano, MD, Co-Head of Global Client Development

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

(703) 236-1790



Patrick A. Torrey, MD, Co-Head of Global Client Development  
[ptorrey@strategicgroup.com](mailto:ptorrey@strategicgroup.com)  
(703) 236-1757

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**92. Summit Rock Advisors**, New York, NY  
**\$22bn** discretionary assets (avg. client \$450MM)  
David Dechman, CEO & co-Founder  
[david.dechman@summit-rock.com](mailto:david.dechman@summit-rock.com)  
(212) 993-7160

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**93. 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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**94. 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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**95. The Family Office at Synovus**, Columbus, GA  
**\$8.5bn** discretionary assets  
\$10.4bn AUA  
Mike Sluder, CIO  
[michaelsluder@synovus.com](mailto:michaelsluder@synovus.com)  
Walt Deriso, Director of Strategic Growth  
[waltderiso@synovus.com](mailto:waltderiso@synovus.com)  
(706) 644-2063

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**96. 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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**97. 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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**98. Truist Bank**, Atlanta, GA

**\$18.5bn** discretionary assets

Stephen Yarbrough, Foundations & Endowments Specialty Practice

[Stephen.yarbrough@truist.com](mailto:Stephen.yarbrough@truist.com)

(404) 788-4401

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**99. Verger Capital Management**, Winston-Salem, NC

**\$2.8bn** discretionary assets

Michael Collins, Managing Director

[mcollins@vergercapital.com](mailto:mcollins@vergercapital.com)

(336) 934-4146

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**100. Verus Advisory**, Seattle, WA

**\$9.1bn** discretionary assets

\$1.1trillion advisory

Jeffrey MacLean, CEO

[jmaclean@verusinvestments.com](mailto:jmaclean@verusinvestments.com)

(206) 622-3700

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**101. Wespath Institutional**, Glenview, IL

**\$5.3bn** discretionary assets

T. Joseph Halwax, Managing Director Institutional Services

[jhalwax@wespath.org](mailto:jhalwax@wespath.org)

(847) 866-4307

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**102. Willis Towers Watson**, Chicago, IL

**\$167bn** 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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**103. Wilmington Trust**, Wilmington, DE

**\$79.4bn** discretionary assets

Patrick Decker, Head of Institutional OCIO

[pdecker1@wilmingtontrust.com](mailto:pdecker1@wilmingtontrust.com)

(610) 773-6120

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**104. 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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**104 Firms - \$4.456 trillion OCIO AUM**

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## **Appendix**

### **Companies grouped by OCIO AUM (as of 6-30-24)**

#### **Over \$100bn (13)**

\$492,000,000,000 - Mercer  
\$366,400,000,000 - Goldman Sachs  
\$333,000,000,000 - BlackRock  
\$301,500,000,000 - Russell Investments  
\$209,000,000,000 - CAPTRUST  
\$199,600,000,000 - Morgan Stanley  
\$197,400,000,000 - SEI Institutional Group  
\$189,000,000,000 - AON  
\$179,200,000,000 - J.P. Morgan Asset & Wealth Mgmt  
\$171,000,000,000 - State Street Global Advisors  
\$167,000,000,000 - Willis Towers Watson  
\$121,000,000,000 - Wilshire Associates  
\$119,800,00,0000 – NEPC  
**\$3,045,900,000,000**

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#### **\$50bn – \$99.9bn (9)**

\$97,800,000,000 - Bank of America  
\$97,500,000,000 - Northern Trust  
\$79,400,000,000 - Wilmington Trust  
\$74,600,000,000 - Cambridge Associates

\$71,700,000,000 - PNC Bank  
\$60,100,000,000 - Regions Asset Management  
\$60,000,000,000 - Partners Capital Investment Group  
\$57,900,000,000 - Alan Biller and Associates  
\$57,000,000,000 - Brown Brothers Harriman  
**\$656,000,000,000**

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**\$20bn – \$49.9bn (13)**

\$46,700,000,000 - Callan  
\$36,800,000,000 - PFM Asset Management  
\$28,000,000,000 - Strategic Investment Group  
\$27,700,000,000 - Fiducient Advisors  
\$27,500,000,000 - BBR Partners  
\$26,700,000,000 - Marquette Associates  
\$26,000,000,000 - Meketa Fiduciary Management  
\$24,900,000,000 - Principal Asset Management  
\$22,000,000,000 - Summit Rock Advisors  
\$21,600,000,000 - Silvercrest Asset Management  
\$21,100,000,000 - CornerStone Partners  
\$20,500,000,000 - Hirtle Callaghan  
\$20,000,000,000 - Makena  
**\$349,500,000,000**

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**\$10bn – \$19.9bn (14)**

\$19,580,000,000 - Fidelity Institutional  
\$18,500,000,000 - Citi  
\$18,500,000,000 - Truist Bank  
\$17,500,000,000 - Cerity Partners OCIO (formerly Agility)  
\$17,400,000,000 - Hall Capital Partners  
\$15,300,000,000 - Commonfund  
\$15,180,000,000 - Highland Associates  
\$15,000,000,000 - Investure  
\$12,400,000,000 - FEG Investment Advisors  
\$12,000,000,000 - Global Endowment Management

\$10,600,000,000 - Bridges Trust  
\$10,500,000,000 - Glenmede  
\$10,500,000,000 - Mill Creek Capital Advisors  
\$10,000,000,000 - Evoke Advisors  
**\$205,060,000,000**

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**\$5bn – \$9.9bn (19)**

\$9,840,000,000 - Gallagher Fiduciary Advisors  
\$9,140,000,000 - Fiduciary Trust International  
\$9,100,000,000 - Verus Investments  
\$8,500,000,000 - The Family Office at Synovus  
\$8,300,000,000 - Lazard Family Office Partners  
\$8,000,000,000 - TIFF Investment Management  
\$7,900,000,000 - F.L. Putnam Investment Management Co.  
\$7,800,000,000 - ICG Advisors  
\$7,470,000,000 - Natixis Investment Managers Solutions  
\$7,100,000,000 - BNY Mellon Advisors  
\$6,400,000,000 - Angeles Investment Advisors  
\$6,300,000,000 - Gerber Taylor  
\$6,200,000,000 - RockCreek  
\$6,100,000,000 - Brown Advisory  
\$6,000,000,000 - Capricorn Investment Group  
\$6,000,000,000 - Spider Management  
\$5,500,000,000 - Seven Bridges Advisors  
\$5,300,000,000 - Wespath Institutional  
\$5,000,000,000 - Prime Buchholz  
\$135,950,000,000

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**\$1bn – \$4.99bn (25)**

\$4,600,000,000 - Alesco Advisors  
\$4,200,000,000 - The Colony Group  
\$4,000,000,000 - Cornerstone Advisors  
\$3,500,000,000 - Prodigy Asset Management  
\$3,200,000,000 - Canterbury Consulting

\$2,800,000,000 - Verger Capital Management  
\$2,780,000,000 - Guardian Partners  
\$2,591,000,000 - PermCap Investment Office  
\$2,500,000,000 - Morgan Creek Capital Management  
\$2,400,000,000 - Disciplina  
\$2,300,000,000 - Inatai Investment Management  
\$2,200,000,000 - LCG Associates  
\$2,050,000,000 - Syntrinsic Investment Counsel  
\$2,000,000,000 - Crewcial Partners  
\$1,800,000,000 - Sellwood Consulting  
\$1,700,000,000 - Brockenbrough  
\$1,700,000,000 - Miller Investment Management  
\$1,600,000,000 - Global Strategic Investment Solutions  
\$1,500,000,000 - Clearbrook Global Advisors  
\$1,500,000,000 - HighGround Advisors  
\$1,300,000,000 - Cornerstone Portfolio Research  
\$1,300,000,000 - Fiduciary Wealth Partners  
\$1,300,000,000 - Multilateral Endowment Mgmt Co. (MEMCO)  
\$1,200,000,000 - McMorgan & Company  
\$1,000,000,000 - Torreyana Capital  
**\$56,621,000,000**

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**Under \$1bn (11)**

\$888,000,000 - Acansa Investment Management  
\$822,000,000 - Atlas Capital Advisors  
\$700,000,000 - Blue Edge Capital  
\$690,000,000 - RiskBridge Advisors  
\$653,000,000 - Point Olema Capital Partners  
\$614,000,000 - Asset Consulting Group  
\$500,000,000 - Courier Capital  
\$500,000,000 - Harpswell Capital Advisors  
\$430,000,000 - Pivotal Advisors  
\$425,000,000 - Holt CIO  
\$278,000,000 - Aetos Alternatives Management  
**\$6,500,000,000**