

Outsourced Chief Investment Officer (OCIO) Directory, spring 2025

(AUM as of December 31, 2024)

Charles Skorina & Company

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

Office: 520-428-4180

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

\$903mm total

Mary L. Cahill, CEO & CIO

mcahill@acansa-inv.com

(703) 639-1888

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

\$274mm discretionary assets

\$4.7bn 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

(212) 201-2560

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

\$60bn discretionary assets

\$160bn total

Alan D. Biller, Chairman

Jennifer Newell, CEO

info@alanbiller.com

(650) 328-7283

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

\$4.72bn discretionary assets

\$5.59bn total

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

tgreen@alescoadvisors.com

(585) 586-0970 Office

(585) 749-0357 Cell

5. Angeles Investment Advisors, Santa Monica, CA

\$7.1bn discretionary assets

\$35.8bn total

Garry Duncan, Managing Director, Head of Client Development

gduncan@angelesinvestments.com

(310) 857-5825

6. AON, Chicago, IL

\$181bn global discretionary assets

\$4.303 trillion global advisory

Beth Halberstadt, US Investments Defined Contribution Solutions Leader

beth.halberstadt@aon.com

(312) 391-3718

7. Asset Consulting Group, St. Louis, MO

\$614mm discretionary assets

\$200bn total

George A. Tarlas, Senior Managing Director

george.tarlas@acgnet.com

(314) 862-4848

8. Atlas Capital Advisors, San Francisco, CA

\$945mm discretionary assets

\$1.1bn total

Ken Frier, Chief Investment Officer

ken@atlasca.com

Leslie Krampert, Managing Director

leslie@atlasca.com

(415) 689-1109

9. Bank of America, New York, NY

\$103.4bn institutional discretionary assets

\$1.9 trillion total managed assets

Bernard Reidy, Managing Director, National
Endowment and Foundations Executive

bernard.reidy@bofa.com

(203) 571-5341

10. BBR Partners, New York, NY

\$28.9bn discretionary assets

\$31.2bn total

Todd Whitenack, Co-Managing Partner

TWhitenack@bbrpartners.com

(212) 313-9875

11. BlackRock, New York, NY
\$353bn global discretionary asset
\$11.6 trillion total
John Simpson, Managing Director, Head of OCIO for Americas
within Multi-Asset Strategies & Solutions (MASS)
john.simpson@blackrock.com
(212) 810-3683

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

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

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

15. Brockenbrough, Richmond, VA
\$1.8bn discretionary OCIO assets
\$4.3bn total
Wesley Carroccio, Managing Director, Strategic Initiatives
wcarroccio@brockenbroughinc.com
(610) 659-9168

16. Brown Advisory, Baltimore, MD
\$7bn discretionary OCIO assets
\$17bn total discretionary assets
Brigid Peterson, Head Endowment & Foundations
bpeterson@brownadvisory.com
(410) 537-5379

17. Brown Brothers Harriman, New York, NY

\$57.0bn discretionary assets

Tom Davis, Partner

thomas.davis@bbh.com

(212) 493-8699

18. Callan, San Francisco, CA

\$46.2bn discretionary assets

\$4.6 trillion advisory

James A. Callahan, President

callahan@callan.com

Mark Andersen, Head of Trust Advisory Group

andersen@callan.com

(415) 974-5060

19. Cambridge Associates, Boston, MA

\$86.2bn discretionary assets

\$616bn advisory

Mary Pang, Global Head of Client Solutions

mpang@cambridgeassociates.com

(415) 791-3119

20. Canterbury Consulting, Newport Beach, CA

\$4.2bn discretionary assets

\$48.1bn advisory

D. Robinson (Bob) Cluck, Chairman

bcluck@canterburyconsulting.com

(949) 718-2229

Poorvi Parekh, Director

pparekh@canterburyconsulting.com

(949) 718-2224

21. Capricorn Investment Group, New York, NY

\$6.0bn discretionary assets

\$12.0bn total

Kunle Apampa, Head of Client Solutions

kapampa@capricornllc.com

(646) 289-3031

22. CAPTRUST, Raleigh, NC

\$237bn discretionary assets

\$845bn advisory

Greg Middleton, Senior Director Marketing

greg.middleton@captrust.com

(919) 278-9814

23. **Cerity Partners OCIO**, Denver, CO

\$17.3bn discretionary assets

Chris Bittman, Partner

cbittman@ceritypartners.com

(303) 813-7910

24. **Citi**, New York, NY

\$19.4bn discretionary assets

\$109.7bn total

John Anderson, Managing Director, Head of Institutional Investment Strategies

john.anderson@citi.com

(212) 559-8881

Ryan Robinson, Managing Director, North America Team Lead

ryan.robinson@citi.com

(813) 604-7152

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

\$2.2bn discretionary assets

\$13.2bn advisory assets

Elliott Wislar, CEO

ewislar@clrbk.com

Gregg Sibert, Chief Marketing Officer

gsibert@clrbk.com

(212) 683-6686

26. **Clearstead Advisors**, Cleveland, OH

\$9.4bn discretionary assets

Alex Shannon, Director of Business Development

ashannon@clearstead.com

(330) 807-2733

27. **Commonfund**, Wilton, CT

\$16bn discretionary OCIO assets

\$29.2bn total

Mark Anson, President, CEO & CIO, Commonfund

Tim Yates, President, CEO & Commonfund OCIO

tim.yates@commonfund.org

(203) 563-5238

28. **Cornerstone Advisors AM**, Bethlehem, PA

\$4.4bn discretionary assets

\$8.3bn total

J.P. Cavaliere, Senior Consultant

jcavaliere@cornerstone-companies.com

(610) 694-0900 (o)

(484) 941-2685 (c)

29. CornerStone Partners, Charlottesville, VA

\$23.3bn discretionary assets

\$24.8bn total

Mike Pagliaro, Director

mpagliaro@cstonellc.com

(610) 290-6660

30. Cornerstone Portfolio Research, Chester Springs, PA

\$1.8bn discretionary assets

\$6.0bn total

Thomas Balis, Principal and CIO

thomas@cornerstoneportfolioresearch.com

(484) 631-3684

31. Courier Capital, Buffalo, NY

\$500mm discretionary assets

\$3bn total

James E. Iglewski, President

jeiglewski@couriercapital.com

(716) 883-9595

32. Crewcial Partners, New York, NY

\$2.0bn discretionary assets

\$28.2bn advisory

Charlie Georgalas, Managing Director

ccg@crewcialpartners.com

(212) 218-4900

33. Disciplina, Nashville, TN

\$2.7bn discretionary assets

Matthew W. Wright, President & CIO

mww@disciplina.com

(615) 490-6002

Brian Arsenault, Managing Director

brian@disciplina.com

(615) 490-8586

34. Evoke Advisors, Los Angeles, CA

\$12.2bn discretionary assets

\$15.2bn advisory

Damien Bisserier, Managing Partner, Co-CIO

dbisserier@evokedadvisors.com

(424) 283-3802

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

\$13.4bn discretionary assets

\$77.1bn advisory

Alan Lenahan, CEO

Devinne Verst, Head of Client Development

dverst@feg.com

Wess McKeown, Institutional Client Development

wmckeown@feg.com

(513) 977-4400

36. **Fidelity Institutional**, Boston, MA

\$22.43bn OCIO advisory solutions

Eric Lussen, SVP, Endowments & Foundations

eric.lussen@fmr.com

(312) 343-4408 Office

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

danielle.frissell@fmr.com

(401) 292-3452 Office

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

\$9.06bn discretionary assets

\$39.44bn total

Ronald Sanchez, CIO

rsanchez@ftci.com

Kate Huntington, Head of Advisory Solutions Group

kate.huntington@ftci.com

(877) 384-1111

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

\$1.3bn discretionary assets

\$2.2bn total

Preston McSwain, Managing Partner

preston@fwp.partners

(617) 602-1901

39. **Fiducient Advisors**, Chicago, IL

\$27.7bn discretionary assets

\$305.5bn advisory

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

mchase@fiducient.com

Matt Porter, Managing Partner

mporter@fiducient.com

Sabrina Bailey, CEO

sbailey@fiducient.com

(800) 260-5445

40. F.L. Putnam IMC, Lynnfield, MA

\$8.2bn discretionary assets

\$12.4bn total

Chris McVey, Director of Business Development

cmcvey@flputnam.com

(781) 591-8265

41. Gallagher Fiduciary Advisors, Washington, D.C.

\$10.83bn discretionary assets

\$130.87bn advisory

Michael Johnson, President

michael_w_johnson@ajg.com

Phil Fabrizio, Area Director

phil_fabrizio@ajg.com

(202) 898-2270

42. Gerber Taylor, Memphis, TN

\$10.3bn discretionary assets

\$10.7bn total

Charles Gerber, President

cgerber@gerbertaylor.com

Matthew Kinnear, Client Development

mkinnear@gerbertaylor.com

(901) 526-9750

43. Glenmede, Philadelphia, PA

\$10.8bn tax-exempt OCIO assets

\$46.8bn total

Adam M. Conish, Director of Endowment & Foundation Management

adam.conish@glenmede.com

(215) 419-6676

Jerrold Charles, VP & Business Development Director

jerrol.charles@glenmede.com

(917) 501-0241

44. Global Endowment Management, Charlotte, NC

\$12bn discretionary assets

Stephanie Lynch, Managing Partner

slynch@geminvestments.com

(704) 333-8282

Matt Bank, Partner

mbank@geminvestments.com

(704) 370-1686

45. Global Strategic Investment Solutions, Scottsdale, AZ

\$1.7bn discretionary assets

Curt Thompson, Managing Partner

cthompson@gsisus.com

(480) 216-9788

46. Goldman Sachs, New York, NY

\$385.6bn discretionary assets

\$3.14 trillion total

Timothy Braude, Managing Director

timothy.braude@gs.com

(917) 343-2138

47. Guardian Partners Inc., Toronto, ON

(Guardian Capital Group Ltd)

\$5.62bn US discretionary assets

\$117.77bn US total

Anthony Messina, Head of Private Wealth

amessina@guardiancapital.com

(647) 980-6989

48. Harpswell Capital Advisors, New Gloucester/Portland, ME

\$500mm discretionary assets (Serving small endowments, \$3-\$60mm)

\$580mm advisory

Jack Moore, Managing Partner & CIO

Vanessa M. Bryant, COO

jpm@harpswelladvisors.com

vmb@harpswelladvisors.com

(877) 427-7227

49. HighGround Advisors, Dallas, TX

\$1.6 discretionary assets

\$3.0bn advisory

Jordan Lovelady, AVP for Client Investment Solutions

jordan.lovelady@highgroundadvisors.org

(214) 978-3314

50. Highland Associates, Birmingham, AL

\$6.4bn discretionary assets

\$13.8bn advisory

\$20.2bn total

Paige Daniel, President

Courtney Crane, Marketing & Sales Development Partner

ccrane@highlandassoc.com

(205) 933-8664

51. Hi-Line Capital Management, Watertown, SD

\$660mm discretionary assets

Michael Anderson, President & CIO

michael.anderson@hi-linecapital.com

(605) 878-0897

52. Hirtle Callaghan, W. Conshohocken, PA

\$21bn discretionary assets

Garrett Wilson, Managing Director (Institutions)

gwilson@hirtle.com

Susan McEvoy, Managing Director (Families)

smcevoy@hirtle.com

(610) 943-4100

53. Holt CIO, Fort Worth, TX

\$435mm total

Robert M. Holt, Jr., Managing Partner

rholt@holtcap.com

(817) 877-1430

54. ICG Advisors, Los Angeles, CA

\$7.8bn total

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

jassaf@icgadvisors.com

(424) 270-8900

55. Inatai Investment Management, Seattle, WA

\$2.4bn discretionary assets

Peng Wang, CIO

w@inatai.partners

(206) 962-2754

56. Investure, Charlottesville, VA

\$16bn discretionary assets

\$19bn total

Bruce Miller, CEO

bmiller@investure.com

Puja Seam, COO

pseam@investure.com

(434) 220-0280

57. J.P. Morgan Asset & Wealth Management, New York, NY

\$199.4bn discretionary OCIO assets

\$4.0 trillion total

Christopher Fletcher, Global Head, Institutional Investment Solutions

christopher.d.fletcher@jpmorgan.com

(212) 464-1362

58. **Lazard Family Office Partners**, New York, NY

\$8.3bn total

Casey D. Whalen, Head and Chief Investment Officer

casey.whelen@lazard.com

Chris Tiano, Head of business development

chris.tiano@lazard.com

(212) 287-2970

59. **LCG Associates**, Atlanta, GA

\$2.3bn discretionary assets

\$94.4bn advisory

Christopher Philips, SVP, OCIO Practice Leader

cphilips@lcgassociates.com

(770) 644-0100

60. **Makena**, Menlo Park, CA

\$20bn discretionary assets

Joseph Magher, Managing Director

jmagher@makenacap.com

(650) 926-1339

61. **Marquette Associates**, Chicago, IL

\$26bn discretionary assets

\$381bn advisory

Brian Wrubel, CEO

bwrubel@marquetteassociates.com

Nat Kellogg, President

nkellogg@marquetteassociates.com

(312) 527-5500

62. **McMorgan & Company**, San Francisco, CA

\$1.2bn regulatory AUM

\$7.3bn total

Don Palmer, Partner, Senior Managing Director

dpalmer@mcmorgan.com

(312) 720-0718

63. **Meketa Investment Group**, San Diego, CA

\$28bn discretionary assets

\$2.4 trillion advisory

Lisa Rubin, Director of Marketing
lrubin@meketa.com
(760) 795-3450

64. **Mercer**, New York, NY
\$616bn global discretionary assets
\$17.6 trillion advisory
Sylvia Diez, Partner, Wealth, US Investment Sales Leader
sylvia.diez@mercercap.com
(412) 515-7738

65. **Mill Creek Capital Advisors**, Conshohocken, PA
\$9.1bn discretionary assets
\$10.6bn total
Josh Gross, CEO
jgross@millcreekcap.com
(610) 941-7714

66. **Miller Investment Management**, West Conshohocken, PA
\$1.84bn discretionary assets
\$3.9bn non-discretionary
Timothy P. Letter, Managing Director, business development
tletter@millerinv.com
(610) 834-9820 x136

67. **Morgan Creek Capital Management**, Chapel Hill, NC
\$2.5bn discretionary assets
Mark Yusko, CEO & CIO
myusko@morgancreekcap.com
Michael Hennessy, Managing Director
mhennessy@morgancreekcap.com
(919) 933-4004

68. **Morgan Stanley**, New York, NY
\$199.6bn discretionary OCIO assets
General OCIO Inquiries
msocio@morganstanley.com
(212) 296-7735
Lisa Shalett, Managing Director, CIO & Chair, Global Investment Committee
lisa.shalett@morganstanley.com
(212) 296-0335

69. **Multilateral Endowment Management Co.**,
"MEMCO," Edmond, OK
\$1.4bn discretionary assets

\$2.9bn total

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

\$8.09bn discretionary OCIO assets

\$1.4 trillion total AUM

Kevin Finney, Managing Director Consultant Relations

kevin.finney@natixis.com

(617) 449-2580

71. NEPC, Boston, MA

\$132.4bn discretionary assets

\$1.8 trillion total

Steve Charlton, Head of Client Solutions

scharlton@nepc.com

(617) 374-1300

72. Newport Capital Group, Red Bank, NJ

\$2.0bn discretionary assets

\$18.0bn total

Domenic DiPiero, President

ddipiero@newportcapitalgroup.com

(732) 741-8400

73. Northern Trust, Chicago, IL

\$86.8bn discretionary OCIO assets

\$40.0bn AUA OCIO advisory

\$1.3 trillion total NTAM

Lyndsay Ferencak, Director Senior OCIO Specialist

LRF4@ntrs.com

(312) 444-3297

Darius Gill, National Practice Director

DAG9@ntrs.com

(312) 444-7153

74. Partners Capital Investment Group, Boston & London

\$62.3bn total

Leslie (Ahlstrand) Fitzgerald, Partner

leslie.fitzgerald@partners-cap.com

(617) 778-7046

Cathleen Proctor, Principal, Business Development
cathleen.proctor@partners-cap.com
(617) 292-1936

75. **Pathstone**, Englewood, NJ
\$62.1bn discretionary assets
\$99.8bn total
Simon Krinsky, Executive Managing Director
skrinsky@hallcapital.com
(212) 407-0707
Krista Smith, Business Development Manager
ksmith@hallcapital.com
(415) 277-2624

76. **PermCap Investment Office**, Charleston, SC
\$2.1bn discretionary assets
\$4.9bn total
John Regan, Founding Partner & CIO
jr@permcap.com
(843) 882-7955
Connor Carew, Partner
connor@permcap.com
(212) 993-7449

77. **Pivotal Advisors**, New York, NY
\$430mm discretionary assets
Tiffany McGhee, CEO & CIO
tiffany@pivotal-advisors.com
(646) 535-1097

78. **PNC Bank**, Philadelphia, PA
\$44.98bn OCIO discretionary assets
\$82.56bn institutional discretionary assets
Chris McGoldrick, Head of OCIO
chris.mcgoldrick@pnc.com
(610) 764-4780
Grant Duffield, OCIO Sales Director
grant.duffield@pnc.com
(412) 916-3740
Faiza Rehman, Consultant Relations Director
faiza.rehman@pnc.com
(312) 384-8263

79. **Point Olema Capital Partners**, San Francisco, CA
\$653mm discretionary assets

\$2.04bn total

Eric Upin, Co-Founder & Co-CIO

eric@pointolema.com

John O'Connor, Co-Founder & Co-CIO

john@pointolema.com

Nancy Turner, President

nancy@pointolema.com

(415) 851-0411

80. Prime Buchholz & Associates, Portsmouth, NH

\$5bn discretionary assets

\$70.8bn advisory

William F. McCarron, President

bmc@primebuchholz.com

(603) 433-1143

81. Principal Asset Management, Des Moines, IA

\$22.3bn discretionary OCIO assets

\$555.82bn total

Owais Rana, Managing Director, Investment Solutions

rana.owais@principal.com

(212) 603-3611

82. Prodigy Asset Management, Omaha, NE

\$2.1bn discretionary assets

Arnie Ovalles, Partner

arnaldo.ovalles@prodigyllc.com

(402) 502-3231

83. Regions Asset Management, Birmingham, AL

\$60.1bn discretionary assets

S. Alan McKnight, Jr., CIO

alan.mcknight@regions.com

(917) 822-3412

84. RiskBridge Advisors, Norwalk, CT

\$834mm discretionary assets

\$137bn advisory

William Kennedy, CEO and CIO

bkennedy@riskbridgeadvisors.com

(203) 658-6055

85. RockCreek, Washington, D.C.

\$12.2bn discretionary OCIO assets 12-31-24

\$17.3bn total

Afsaneh Beschloss, President and CEO
clientservices@therockcreekgroup.com
(202) 331-3400

86. Russell Investments, Seattle, WA
\$331bn discretionary assets
Lindy Freeman, Managing Director, Global Head of Institutional
lfreeman@russellinvestments.com
(206) 505-1994
Bikram Chadha, Head of Middle Market Institutional Sales &
Consultant Relations
bchadha@russellinvestments.com
(212) 702-7888

87. SEI Institutional Group, Oaks, PA
\$198.4bn discretionary assets
Michael Cagnina, SVP, Managing Director
mcagnina@seic.com
(610) 676-1496

88. Sellwood Investment Partners, Portland, OR
\$2.0bn discretionary assets
\$9.7bn total
Ashlee Moehring, Principal
ashleemoehring@sellwoodconsulting.com
(503) 596-2880

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

90. Silvercrest Asset Management, New York, NY
\$23.3bn discretionary assets
\$36.5bn total
Chris Long, Managing Director Consultant and Client Relations
clong@silvercrestgroup.com
(212) 649-0697

91. Spider Management Company, Richmond, VA
\$6.2bn discretionary assets
William H. McLean, President and CIO
wmclean2@richmond.edu
Rebecca Fender, Director of Investor Relations

rfender@richmond.edu
(804) 200-6902

92. State Street Global Advisors, Boston, MA

\$176bn discretionary assets

Jack Serhant, Head of Solutions Distribution

Jack_Serhant@ssga.com

(617) 664-4599

Deirdre Brett, Head of OCIO Commercial strategy

deirdre_brett@ssga.com

(203) 321-3222

93. Strategic Investment Group, Arlington, VA

\$29.9bn discretionary assets

\$30.2bn total

Nikki Kraus, CEO

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

vglaviano@strategicgroup.com

(703) 236-1790

Patrick A. Torrey, MD, Co-Head of Global Client Development

ptorrey@strategicgroup.com

(703) 236-1757

94. Summit Rock Advisors, New York, NY

\$23.5bn discretionary assets (avg. client \$480MM)

David Dechman, CEO & co-Founder

david.dechman@summit-rock.com

(212) 993-7160

95. Syntrinsic, Denver, CO

\$2.22bn discretionary assets

\$2.66bn total

Jim Brauer, Managing Director, Investor Relations and Consulting

jim.brauer@syntrinsic.com

(303) 518-6370

96. The Family Office at Synovus, Columbus, GA

\$9.0bn discretionary assets

\$11.1bn AUA

Mike Sluder, CIO

michaelsluder@synovus.com

Walt Deriso, Director of Strategic Growth

waltderiso@synovus.com

(706) 644-2063

97. The Haverford Trust Company, Radnor, PA

\$2.4bn discretionary assets

\$15bn Total

Timothy Hoyle, CIO

thoyle@haverfordquality.com

Maxine Cuffe, Director of Global Strategies

mcuffe@haverfordquality.com

(610) 995-8700

98. TIFF Investment Management, Radnor, PA

\$8bn discretionary assets

Kane Brenan, CEO

Jay Willoughby, CIO

Jessica Portis, Chief Client Officer

jportis@tiff.org

(610) 995-8200

99. Torreyana Capital, La Jolla, CA

\$1bn discretionary assets

Kris Ostrander, CEO

kostrander@torreyanacapital.com

(510) 410-1230

100. Truist Foundations & Endowments Specialty Practice, Atlanta, GA

\$20.1bn discretionary assets

Stephen Yarbrough, Head of Institutional Investment Management

Stephen.yarbrough@truist.com

(404) 788-4401

101. U.S. Bancorp Asset Management, Inc., Philadelphia, PA

\$38.1bn discretionary assets

\$393.9bn total

“Jim” Link, Managing Director

valentine.link@usbank.com

John Spagnola, Managing Director

john.spagnolaj@usbank.com

(215) 557-1222

102. Verger Capital Management, Winston-Salem, NC

\$2.9bn discretionary assets

Michael Collins, Managing Director

mcollins@vergercapital.com

(336) 934-4101

103. Verus Advisory, Seattle, WA

\$9.2bn discretionary assets
\$1.2trillion advisory
Jeffrey MacLean, CEO
jmaclean@verusinvestments.com
(206) 622-3700

104. Wespath Institutional, Glenview, IL
\$5.4bn discretionary assets
T. Joseph Halwax, Managing Director Institutional Services
jhalwax@wespath.org
(847) 866-4307

105. Willis Towers Watson, Chicago, IL
\$167bn 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

106. Wilmington Trust, Wilmington, DE
\$80.3bn discretionary assets
Patrick Decker, Head of Institutional OCIO
pdecker1@wilmingtontrust.com
(610) 773-6120
Direct (610) 977-4079 | Cell (610) 773-6120

107. Wilshire Advisors, Santa Monica, CA
\$123bn discretionary OCIO assets
\$1.5 trillion advisory
Leah Emkin, Chief Client Officer
lemkin@wilshire.com
(310) 260-6689

107 Firms - \$4.776 trillion OCIO AUM

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Appendix

Companies grouped by OCIO AUM (as of 12-31-24)

Over \$100bn (14)

\$616,000,000,000 - Mercer
\$385,600,000,000 - Goldman Sachs
\$353,000,000,000 - BlackRock
\$331,000,000,000 - Russell Investments
\$237,000,000,000 - CAPTRUST
\$199,600,000,000 - Morgan Stanley
\$199,400,000,000 - J.P. Morgan Asset & Wealth Management
\$198,400,000,000 - SEI Institutional Group
\$189,000,000,000 - AON
\$176,000,000,000 - State Street Global Advisors
\$167,000,000,000 - Willis Towers Watson
\$132,400,000,000 - NEPC
\$123,000,000,000 - Wilshire Associates
\$103,400,000,000 - Bank of America
\$3,410,800,000,000 (71.44% of total)

\$50bn – \$99.9bn (8)

\$86,800,000,000 - Northern Trust
\$86,200,000,000 - Cambridge Associates
\$80,300,000,000 - Wilmington Trust
\$62,300,000,000 - Partners Capital Investment Group
\$62,100,000,000 - Pathstone (Hall)
\$60,100,000,000 - Regions Asset Management
\$60,000,000,000 - Alan Biller and Associates
\$57,000,000,000 - Brown Brothers Harriman
\$554,800,000,000 (11.62% of total)

\$20bn – \$49.9bn (16)

\$46,200,000,000 - Callan

\$44,980,000,000 - PNC Bank

\$38,100,000,000 - U.S. Bancorp Asset Management, Inc. (PFM)

\$29,900,000,000 - Strategic Investment Group

\$28,900,000,000 - BBR Partners

\$28,000,000,000 - Meketa Fiduciary Management

\$27,700,000,000 - Fiducient Advisors

\$26,000,000,000 - Marquette Associates

\$23,500,000,000 - Summit Rock Advisors

\$23,300,000,000 - CornerStone Partners

\$23,300,000,000 - Silvercrest Asset Management

\$22,430,000,000 - Fidelity Institutional

\$22,300,000,000 - Principal Asset Management

\$21,000,000,000 - Hirtle Callaghan

\$20,100,000,000 - Truist Bank

\$20,000,000,000 - Makena

\$445,710,000,000 (9.33% of total)

\$10bn – \$19.9bn (12)

\$19,400,000,000 - Citi

\$17,300,000,000 - Cerity Partners OCIO (formerly Agility)

\$16,000,000,000 - Commonfund

\$16,000,000,000 - Investure

\$13,400,000,000 - FEG Investment Advisors

\$12,200,000,000 - Evoke Advisors

\$12,200,000,000 - RockCreek

\$12,000,000,000 - Global Endowment Management

\$10,830,000,000 - Gallagher Fiduciary Advisors

\$10,800,000,000 - Glenmede

\$10,600,000,000 - Bridges Trust

\$10,300,000,000 - Gerber Taylor

\$161,030,000,000 (3.37% of total)

\$5bn – \$9.9bn (20)

\$9,400,000,000 – Clearstead Advisors
\$9,200,000,000 - Verus Investments
\$9,100,000,000 - Mill Creek Capital Advisors
\$9,060,000,000 - Fiduciary Trust International
\$9,000,000,000 - The Family Office at Synovus
\$8,300,000,000 - Lazard Family Office Partners
\$8,200,000,000 - F.L. Putnam IMC
\$8,090,000,000 - Natixis Investment Managers Solutions
\$8,000,000,000 - TIFF Investment Management
\$7,800,000,000 - ICG Advisors
\$7,100,000,000 - Angeles Investment Advisors
\$7,100,000,000 - BNY Mellon Advisors
\$7,000,000,000 - Brown Advisory
\$6,400,000,000 - Highland Associates
\$6,200,000,000 - Spider Management Co.
\$6,000,000,000 - Capricorn Investment Group
\$5,620,000,000 - Guardian Partners
\$5,500,000,000 - Seven Bridges Advisors
\$5,400,000,000 - Wespeth Institutional
\$5,000,000,000 - Prime Buchholz
\$138,070,000,000 (3.09% of total)

\$1bn – \$4.99bn (25)

\$4,720,000,000 - Alesco Advisors
\$4,400,000,000 - Cornerstone Advisors
\$4,200,000,000 - Canterbury Consulting
\$2,900,000,000 - Verger Capital Management
\$2,700,000,000 - Disciplina
\$2,500,000,000 - Morgan Creek Capital Management
\$2,400,000,000 - Inatai Investment Management
\$2,400,000,000 - The Haverford Trust Company
\$2,300,000,000 - LCG Associates
\$2,220,000,000 - Synttrinsic Investment Counsel

\$2,200,000,000 - Clearbrook Global Advisors
\$2,100,000,000 - PermCap Investment Office
\$2,100,000,000 - Prodigy Asset Management
\$2,000,000,000 - Crewcial Partners
\$2,000,000,000 - Newport Capital Group
\$2,000,000,000 - Sellwood Consulting
\$1,840,000,000 - Miller Investment Management
\$1,800,000,000 - Brockenbrough
\$1,800,000,000 - Cornerstone Portfolio Research
\$1,700,000,000 - Global Strategic Investment Solutions
\$1,600,000,000 - HighGround Advisors
\$1,400,000,000 - Multilateral Endowment Mgmt Co. (MEMCO)
\$1,300,000,000 - Fiduciary Wealth Partners
\$1,200,000,000 - McMorgan & Company
\$1,000,000,000 - Torreyana Capital
\$56,780,000,000 (1.19% of total)

Under \$1bn (12)

\$945,000,000 - Atlas Capital Advisors
\$903,000,000 - Acansa Investment Management
\$834,000,000 - RiskBridge Advisors
\$700,000,000 - Blue Edge Capital
\$660,000,000 - Hi-Line Capital Management
\$653,000,000 - Point Olema Capital Partners
\$614,000,000 - Asset Consulting Group
\$500,000,000 - Courier Capital
\$500,000,000 - Harpswell Capital Advisors
\$435,000,000 - Holt CIO
\$430,000,000 - Pivotal Advisors
\$274,000,000 - Aetos Alternatives Management
\$7,448,000,000 (0.16% of total)

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