

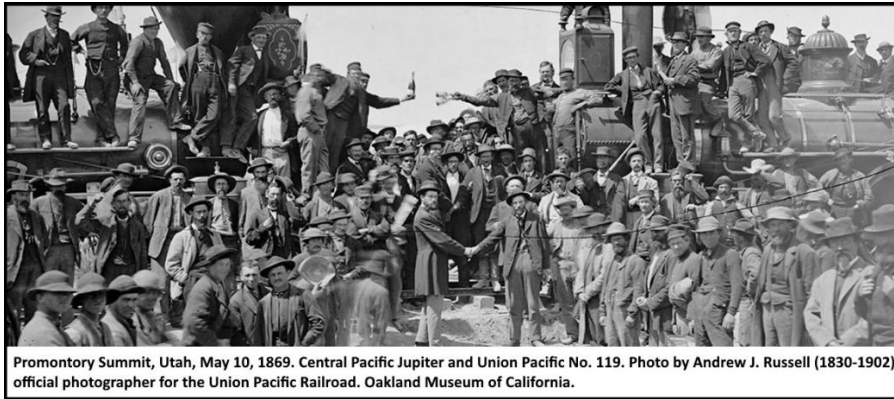
# The Skorina Letter

## ● Retained Executive Search ●

**Our clients:** visionary families, transformative nonprofits, Wall Street trailblazers

**Our vision:** build investment preeminence, create opportunity

**Our work:** recruit, consult, connect



Promontory Summit, Utah, May 10, 1869. Central Pacific Jupiter and Union Pacific No. 119. Photo by Andrew J. Russell (1830-1902) official photographer for the Union Pacific Railroad. Oakland Museum of California.

## It's all about the fit

*One thing I've learned: culture matters when you're doing M&A.* —James Gorman

My client, a regional financial corporation with significant multi-state banking and investment operations, seeks to augment their outsourced, full-discretion, institutional, investment management capabilities through acquisitions, mergers, and creative partnerships.

In short, we're looking for a few like-minded, ambitious, established OCIOs.

With global markets hitting record highs, our [latest directory](#) flush with providers, and related AUM over five trillion dollars, discretionary outsourcers of every persuasion are charging ahead pursuing prominence and place.

When [Hirtle Callaghan](#), [Commonfund](#), [McMorgan & Company](#), and [Strategic Investment Group](#) hung their shingles the outsourced chief investment officer concept was fresh and intriguing, and the field was wide open. But [times have changed](#).

Adding financial muscle, building distribution, enhancing investment capabilities, and developing bench strength – not to mention increasing career opportunities for staff, monetizing sweat equity, and preparing for succession – through a robust acquisition program is the only realistic way to endure and provide lasting client satisfaction.

If you want to be a leader in the OCIO business, there are only three ways to break from the herd: buy, sell, or merge.

—Charles Skorina

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## **CHARLES SKORINA & COMPANY**

*Executive search, OCIO selection, Advise & Consult*

[Recruit](#) preeminent investment talent

[Facilitate](#) OCIO selection

[Advise](#) on growth and acquisitions

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[skorina@charlesskorina.com](mailto:skorina@charlesskorina.com)

[www.charlesskorina.com](http://www.charlesskorina.com)

[www.linkedin.com/in/charlesskorina](https://www.linkedin.com/in/charlesskorina)

[\(520\) 428-4180](tel:5204284180)

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**Prior**

*JPMorgan Chase - Institutional credit, lending, risk management*

*Ernst & Young - Financial systems consulting*

*US Army - Russian Linguist, Japan*

*University of Chicago, MBA, Finance*

*Michigan State University and*

*Middlebury Institute of International Studies at Monterey, BA*

*Culver Academies*

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