Outsourced Chief Investment Officer (OCIO) Directory, Fall 2026

(AUM as of June 30, 2026)

Charles Skorina & Company

http://www.charlesskorina.com skorina@charlesskorina.com
Office: 520-428-4180

1. Alan Biller and Associates, Menlo Park, CA
$69bn discretionary assets
$184bn total
Alan D. Biller, Chairman
Jennifer Newell, CEO
info@alanbiller.com
(650) 328-7283

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2. Alesco Advisors, Pittsford, NY
$5.93bn discretionary assets
$6.89bn total
Todd D. Green, Principal, Business Development & Client Service
tgreen@alescoadvisors.com
(585) 749-0357 cell
(585) 586-0970 office

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3. Angeles Investment Advisors, Santa Monica, CA
$7.79bn discretionary assets
$47bn total
David Brief, Senior MD
dbrief@angelesinvestments.com
(310) 857-5834

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4. AON, Chicago, IL
$222.2bn global discretionary assets
$4.648 trillion global advisory
Rick Berdelle, Director of Business Development
rick.berdelle@aon.com
(312) 381-9713

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5. Asset Consulting Group, St. Louis, MO
$1.3bn discretionary assets

$200bn total
George A. Tarlas, Senior MD
george.tarlas@acgnet.com
(314) 862-4848
(314) 307-8474 George direct

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6. Atlas Capital Advisors, San Francisco, CA
$1.245bn discretionary assets
Ken Frier, Chief Investment Officer
ken@atlasca.com
John Baker, MD
john.baker@atlasca.com
(415) 254-3261

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7. Bank of America, New York, NY
$127.2bn institutional discretionary assets
$2.3 trillion total managed assets
Bernard Reidy, MD, National Endowment & Foundations Executive
bernard.reidy@bofa.com
(203) 571-5341

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8. BBR Partners, New York, NY
$36.1bn discretionary assets
$38.3bn total
Todd Whitenack, Co-Managing Partner
twhitenack@bbrpartners.com
(212) 313-9875

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9. Beacon Pointe Advisors, Newport Beach, CA
$1.9bn discretionary assets
$63bn total
Michael J. Skillman, MD
mskillman@beaconpointe.com
(949) 259-0956

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10. BlackRock, New York, NY
$445bn global discretionary assets
$15.3 trillion total
John Simpson, MD, Head of OCIO for Americas within Multi-Asset Strategies & Solutions (MASS)
john.simpson@blackrock.com
(212) 810-3683
Ned Rosenman, MD, Co-Head of Client Business, Americas Custom and Outsourced Solutions

Ned.Rosenman@blackrock.com
(212) 810-5077
Cassandra Virgin, MD, Co-Head of Client Business, Americas Custom and Outsourced Solutions
Cassandra.Virgin@blackrock.com
(646) 231-8437

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11. Blue Edge Capital, Richmond, VA
$840mm discretionary assets
Peter H. Bowles, MD
pbowles@blueedgecap.com
(804) 673-7404

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12. BNY, New York, NY
$22.9bn discretionary assets
$207.3bn total
Girish Massand, Institutional Solutions Strategist
girish.massand@bny.com
(516) 528-7625

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13. Bridges Trust, Omaha, NE
$12.54bn discretionary assets
$13.73bn AUA
Nick Wilwerding, CEO
nwilwerding@bridgestrust.com
Jack Holmes, CIO
jholmes@bridgestrust.com
(402) 393-8300

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14. Brockenbrough, Richmond, VA
$2.3bn discretionary OCIO assets
$5.0bn total
Matthew P. Shaia, MD & Director Investment Operations
mshaia@brockenbroughinc.com
(804) 288-0404
(804) 212-7169

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15. Brown Advisory, Baltimore, MD
$7bn discretionary OCIO assets
$189bn total firm client assets
Gordon Wagner, Consultant Relations Director
gordonwagner@brownadvisory.com
(443) 613-4756 cell
(410) 537-5400 main

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16. **Brown Brothers Harriman**, New York, NY
$65bn discretionary assets
Tom Davis, Partner
thomas.davis@bbh.com
(212) 493-8699

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17. **Callan**, San Francisco, CA
$58.7bn discretionary assets
$4.7 trillion advisory
Jim Callahan, President
callahan@callan.com
(415) 974-5060
Mark Andersen, SVP Trust Advisory Group
andersen@callan.com
(415) 974-5060
Connie Lee, SVP Investment Consultant
leec@callan.com
(415) 974-5060

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18. **Cambridge Associates**, Boston, MA
$116.8bn discretionary assets
$571.6bn advisory
Mary Pang, Global Head of Client Solutions
mpang@cambridgeassociates.com
(415) 791-3119

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19. **Canterbury Consulting**, Newport Beach, CA
$6.3bn discretionary assets
$67.6bn advisory
Poorvi Parekh, Managing Director
pparekh@canterburyconsulting.com
(949) 718-2224
Garrett Jackson, Director of Analytics
gjackson@canterburyconsulting.com
(949) 718-2276

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20. **Capricorn Investment Group**, New York, NY
$3.2bn full OCIO discretionary assets
$8.0bn partial-discretionary OCIO assets
$32.1bn total
Nick Flores, Partner
nflores@capricornllc.com
(646) 289-3030

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21. **CAPTRUST**, Raleigh, NC

$320bn discretionary assets
$916bn advisory
Greg Middleton, Senior Director Marketing
greg.middleton@captrust.com
(919) 278-9814

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22. Cerity Partners OCIO, Denver, CO
$23.2bn discretionary assets
Chris Bittman, Partner
cbittman@ceritypartners.com
(303) 813-7910

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23. Citi, New York, NY
$23.8bn multi-asset class discretionary assets
Kerry White, MD, Head of Citi Investment Management
kerry.white@citi.com
(212) 559-8640
Matt Hoehn, MD, Head of Multi-Asset Class Solutions
matt.hoehn@citi.com
(201) 563-2056

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24. Clearbrook Global Advisors, New York, NY
$2.2bn discretionary assets
$13.2bn advisory assets
Elliott Wislar, CEO
ewislar@clrbrk.com
Gregg Sibert, Chief Marketing Officer
gsibert@clrbrk.com
(212) 683-6686

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25. Clearstead Advisors, Cleveland, OH
$11.1bn discretionary assets
Alex Shannon, MD of Business Development
ashannon@clearstead.com
(330) 807-2733

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26. Commonfund, Norwalk, CT
$18.1bn discretionary OCIO assets
$31.5bn total
Mark Anson, President, CEO & CIO, Commonfund
Tim Yates, President, CEO & Commonfund OCIO
tim.yates@commonfund.org
(203) 563-5238

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27. Cornerstone Advisors Asset Management, Bethlehem, PA

$4.8bn discretionary assets
$9.5bn total
J.P. Cavaliere, Director, Institutional Solutions
jcavaliere@cornerstone-companies.com
(610) 694-0900 office
(484) 941-2685 cell

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28. **CornerStone Partners**, **Charlottesville, VA**
$31bn discretionary assets
Mike Pagliaro, Director
mpagliaro@cstonellc.com
(610) 290-6660

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29. **Cornerstone Portfolio Research**, **Chester Springs, PA**
$500mm discretionary assets
$6.8bn total
Thomas Balis, Principal and CIO
thomas@cornerstoneportfolioresearch.com
(484) 631-3684

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30. **Crewcial Partners**, **New York, NY**
$2.0bn discretionary assets
$28.2bn advisory
Charlie Georgalas, MD
ccg@crewcialpartners.com
(212) 218-4900

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31. **Cynosure Capital Management**, **Salt Lake City, UT**
$4.868bn OCIO assets
$9.924bn total (Cynosure Group)
Mark Siddoway, President
mark.siddoway@cynosuregroup.com
(801) 888-9576

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32. **Disciplina Group**, **Nashville, TN**
$3.2bn discretionary assets
Matthew W. Wright, President & CIO
ir@disciplina.com
(615) 490-6007

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33. **Ehrenkranz Partners**, **New York, NY**
$7.0bn discretionary assets
$20bn advisory
John B. Ehrenkranz, Partner
john.ehrenkranz@eplp.com

(212) 801-2301

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34. FEG Investment Advisors, Cincinnati, OH
$16.7bn discretionary assets
$83.7bn advisory
Alan Lenahan, CEO
Wes McKeown, Vice President Institutional Client Development
wmckeown@feg.com
(513) 977-4400

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35. Ferguson Wellman Capital Management, Portland, OR
$11.6bn discretionary assets
Jim Coats, Executive Vice President
Jim.coats@fergwell.com
Nate Putnam, Senior Vice President
Nathan.putnam@fergwell.com
Danielle Hart, Vice President
Danielle.hart@fergwell.com
(503) 226-1444

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36. Fidelity Institutional, Boston, MA
$27.87bn 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

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37. Fiduciary Wealth Partners, Boston, MA
$1.5bn discretionary assets
$2.5bn total
Preston McSwain, Managing Partner
preston@fwp.partners
(617) 602-1901

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38. F.L. Putnam IMC, Lynnfield, MA
$11.1bn discretionary assets
$15.6bn total
Chris McVey, Director of Business Development
cmcvey@flputnam.com
(781) 591-8265

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39. Franklin Templeton, New York, NY
$40.7bn discretionary assets

$1.8 trillion total AUM
Rich Nuzum, Head of OCIO
rich.nuzum@franklintempleton.com
(917) 230-8294

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40. **Gallagher Fiduciary Advisors**, **Washington, D.C.**
$13.56bn discretionary assets
$203.11bn advisory
Michael Johnson, Area President
michael_w_johnson@ajg.com
Phil Fabrizio, Area Senior Vice President and Area Director
phil_fabrizio@ajg.com
(202) 898-2270

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41. **Gerber Taylor**, **Memphis, TN**
$7.6bn discretionary assets
$7.2bn AUA
Matthew Kinnear, Client Development
mkinnear@gerbertaylor.com
(901) 526-9750

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42. **Glenmede**, **Philadelphia, PA**
$12.5bn tax-exempt OCIO assets
$53bn total
Brigid Peterson, Director of Endowment & Foundation Business
brigid.peterson@glenmede.com
(215) 419-6136
Jerrol Charles, VP & Business Development Director
jerrol.charles@glenmede.com
(917) 501-0241

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43. **Global Endowment Management (GEM)**, **Charlotte, NC**
$13.4bn discretionary assets
Stephanie Lynch, Managing Partner
slynch@geminvestments.com
Alex Kocher, MD
akocher@geminvestments.com
(704) 370-1706

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44. **Global Strategic Investment Solutions**, **Scottsdale, AZ**
$1.7bn discretionary assets
Curt Thompson, Managing Partner
cthompson@gsisus.com
(480) 216-9788

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45. Goldman Sachs, New York, NY
$540.7bn discretionary assets
$4.0 trillion total
Jared Dickow, MD
jared.dickow@gs.com
(212) 902-8835

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46. Guardian Capital Group Ltd., Toronto, ON
& Desjardins Global Asset Management
$6.2bn US discretionary assets
$221.1bn US total
Anthony Messina, Head of Private Wealth
amessina@guardiancapital.com
(647) 980-6989

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47. GuideStone Investment Services, Dallas, TX
$3.17bn discretionary assets
$738 mm non-discretion
Bret Curlee, MD, Investment Services
Bret.curlee@guidestone.org
(214) 720-1198

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48. Harpswell Capital Advisors, Yarmouth, ME
$711mm discretionary assets (Serving small endowments, $3-$60mm)
Jack Moore, Managing Partner & CIO
Vanessa M. Bryant, COO
jpm@harpswelladvisors.com
vmb@harpswelladvisors.com
(877) 427-7227

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49. HighGround Advisors, Dallas, TX
$1.8bn discretionary assets
$3.6bn advisory
Jordan Lovelady, Vice President for Client Investment Solutions
jordan.lovelady@highgroundadvisors.org
(214) 978-3314

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50. Highland Associates, Birmingham, AL
$8.3bn discretionary assets
$19bn total
Paige Daniel, President
pdaniel@highlandassoc.com
(205) 939-8308

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51. Hi-Line Capital Management, Watertown, SD

$800mm discretionary assets
$1.15bn advisory assets
Michael Anderson, President & CIO
michael.anderson@hi-linecapital.com
(605) 878-0897

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52. **Hirtle & Co.**, W. Conshohocken, PA
$25.7bn discretionary assets
Garrett Wilson, MD (Institutions)
gwilson@hirtle.com
Susan McEvoy, MD (Families)
smcevoy@hirtle.com
(610) 943-4100

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53. **Holt CIO**, Fort Worth, TX
$493mm total
Robert M. Holt, Jr., Managing Partner
rholt@holtcap.com
(817) 877-1430

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54. **ICG Advisors**, Los Angeles, CA
$2.2bn discretionary assets
$8.0bn total
J. Jeffrey Assaf, Sr., MD & CIO
jassaf@icgadvisors.com
(424) 270-8900 main

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55. **Inatai Investment Management**, Seattle, WA
$3.0bn discretionary assets
Peng Wang, CIO
w@inatai.partners
(206) 962-2754

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56. **Investure**, Charlottesville, VA
$21bn discretionary assets
$24bn total assets
Bruce Miller, CEO
bmiller@investure.com
Puja Seam, COO
pseam@investure.com
(434) 220-0280

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57. **Jasper Ridge Partners**, Menlo Park, CA
$42bn discretionary assets 12-31-25
Aaron Abrahms, Partner

aabrahms@jasperridge.com
(650) 494-4829 office
(646) 506-1426 cell

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58. J.P. Morgan Asset & Wealth Management, New York, NY
$242.4bn discretionary OCIO assets
$5.1 trillion total
Christopher Fletcher, Global Head, Institutional Investment Solutions
christopher.d.fletcher@jpmorgan.com
(212) 464-1362

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59. Lazard Wealth, New York, NY
$9.2bn total
Jerome Antenen, MD, Head & CIO
jerome.antenen@lazard.com
(212) 287-2969

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60. LCG Associates, Atlanta, GA
$2.36bn discretionary assets
$115.12bn advisory
Christopher Philips, OCIO Practice Leader
cphilips@lcgassociates.com
(770) 644-0100

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61. Makena, Menlo Park, CA
$23bn discretionary assets
Joseph Magher, MD
jmagher@makenacap.com
(650) 926-1339

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62. Marquette Associates, Chicago, IL
$34bn discretionary assets
$435bn advisory assets
Nat Kellogg, President
nkellogg@marquetteassociates.com
Jessica Noviskis, Portfolio Strategist, OCIO Services
jnoviskis@marquetteassociates.com
(312) 527-5500

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63. Marsh, New York, NY
$846.23bn global discretionary assets
$365.135bn US discretionary assets
$17.2 trillion advisory
Sylvia Diez, Sales Leader, Marsh Investments and Retirement, US
sylvia.diez@mercer.com

(412) 515-7738

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64. **McMorgan & Company**, San Francisco, CA
$7.7bn regulatory AUM
$10.9bn total
Don Palmer, Partner, Senior MD
dpalmer@mcmorgan.com
(312) 720-0718
Michael Sweeney, Vice President
msweeney@mcmorgan.com
(312) 758-3470

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65. **Meketa Investment Group**, San Diego, CA
$29.2bn discretionary assets
$2.8 trillion advisory
Lisa Rubin, Director of Marketing
lrubin@meketa.com
(760) 795-3450

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66. **Miller Investment Management**, West Conshohocken, PA
$1.776bn discretionary assets
$5.329bn non-discretion
Timothy P. Letter, MD, business development
tletter@millerinv.com
(610) 834-9820 x136
(804) 517-1284 cell

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

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68. **Morgan Stanley**, New York, NY
$353.2bn discretionary OCIO assets
General OCIO Inquiries
msocio@morganstanley.com
(212) 296-7735
Sona Menon, MD, Head of OCIO
Sona.menon@morganstanley.com
(212) 762-0264
Lisa Shalett, MD, CIO & Chair, Global Investment Committee
lisa.shalett@morganstanley.com

(212) 296-0335

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69. Multilateral Endowment Management Co., "MEMCO," Edmond, OK
$1.9bn discretionary assets
$4.0bn total
Ryan Harms, CIO
rharms@memco-invest.com
(405) 334-6588
Ashley Roche, COO & General Counsel
aroche@memco-invest.com
405-714-7827

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70. NEPC, Boston, MA
$154.3bn discretionary assets
$1.93 trillion total
Rick Ciccione, Partner
rciccione@nepc.com
(312) 585-9689

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71. Newport Capital Group, Red Bank, NJ
$3.2bn discretionary assets
$23bn total
Domenic DiPiero, President
ddipiero@newportcapitalgroup.com
(732) 741-8400

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72. Northern Trust, Chicago, IL
$102.4bn discretionary OCIO assets
$34.3bn AUA OCIO advisory
$1.6 trillion total NTAM
Lyndsay Ferencak, Director, Senior OCIO Specialist
LRF4@ntrs.com
(312) 444-3297

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73. Northside Capital Management, Hood River, OR
$2.14bn discretionary assets
$7.25bn total
Alex McCulloch, Director of Client Strategy
mcculloch@northsidecap.com
(310) 779-8824

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74. Partners Capital Investment Group, Boston & London
$84bn 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

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75. Pathstone, Englewood, NJ
$81.4bn discretionary assets
$124.4bn total
Krista Stickel, Director
kstickel@pathstone.com
(415) 277-2624

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76. PermCap Investment Office, Charleston, SC
$1.8bn discretionary assets
$4.0bn total
John Regan, Founding Partner & CIO
jr@permcap.com
(843) 882-7955
Connor Carew, Managing Partner
connor@permcap.com
(212) 993-7449

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77. Pivotal Advisors, New York, NY
$1bn discretionary assets
Tiffany McGhee, CEO & CIO
tiffany@pivotal-advisors.com
(646) 535-1097

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78. PNC Institutional Asset Management, Washington, DC
$58.52bn OCIO discretionary assets
$100.38bn institutional discretionary assets
Stacey Herndon, Director of Investments and OCIO Solutions
stacey.herndon@pnc.com
(202) 835-6757

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79. Point Olema Capital Partners, San Francisco, CA
$735mm discretionary assets
$4.2bn total
Nancy Turner, President
nancy@pointolema.com
(415) 851-0411
John O'Connor, Founder & Co-CIO
Brian Koh, Investment Director

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80. **Prime Buchholz & Associates**, Portsmouth, NH
$7bn discretionary assets
$79.0bn advisory
William F. McCarron, President
bmc@primebuchholz.com
(617) 633-8704 direct
Adam Leech, Head of business development
Adam.leech@primebuchhloz.com
(207) 216-7483
(603) 433-1143 main

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81. **Principal Asset Management**, Des Moines, IA
$22.3bn discretionary OCIO assets
$555.82bn total
Owais Rana, MD, Investment Solutions
rana.owais@principal.com
(212) 603-3611

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82. **Prodigy Asset Management**, Omaha, NE
$2.8bn discretionary assets
Arnie Ovalles, Partner
arnaldo.ovalles@prodigyllc.com
(402) 502-3231

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83. **Regions Asset Management**, Birmingham, AL
$75bn discretionary assets
S. Alan McKnight, Jr., CIO
alan.mcknight@regions.com
(917) 822-3412

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84. **RiskBridge Advisors**, Norwalk, CT
$1.0bn discretionary assets
$63bn advisory
William Kennedy, CEO and CIO
bkennedy@riskbridgeadvisors.com
(203) 658-6055

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85. **RockCreek**, Washington, D.C.
$14.4bn discretionary OCIO assets
$19.4bn total
Afsaneh Beschloss, President and CEO
clientservices@therockcreekgroup.com
(202) 331-3400

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86. **Russell Investments**, Seattle, WA

$418bn OCIO AUM
$964bn advisory AUA
Lindy Freeman, MD, Global Head of Institutional
lfreeman@russellinvestments.com
(212) 702-7955
Bikram Chadha, Senior Director, Head of Middle Market Institutional Sales & Consultant Relations
bchadha@russellinvestments.com
(212) 702-7888

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87. SEI Institutional Group, Oaks, PA
$220.62bn discretionary assets
Kevin Matthews, Head of North America Institutional Asset Management
kmatthews@seic.com
(610) 676-2631

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88. Sellwood Investment Partners, Portland, OR
(a Wealthspire Company)
$2.3bn discretionary assets
$11.1bn total
Ashlee Moehring, Principal
ashleemoehring@sellwoodip.com
(503) 596-2880

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89. Silvercrest Asset Management, New York, NY
$24.0bn discretionary assets
$37.0bn total
Allen Gray, Global Head of Institutional Business
agray@silvercrestgroup.com
(212) 649-0765

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90. Spider Management Company, Richmond, VA
$8.1bn discretionary assets
Rebecca Fender, MD, Investor Relations
rfender@richmond.edu
(804) 200-6902

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91. State Street Investment Management, Boston, MA
$264.2bn discretionary assets
Jack Serhant, Head of Solutions Distribution
Jack_Serhant@statestreet.com
(617) 664-4599
Maddy Adams, Business Development
madeleine_adams_1@statestreet.com
(917) 672-2320

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92. **Strategic Investment Group**, Arlington, VA
$36.32bn discretionary assets
Nikki Kraus, CEO
Valentina Glaviano, Co-Head of Global Client Development
vglaviano@strategicgroup.com
Tel: (703) 236-1790 / Cell: (415) 672-4051
Patrick A. Torrey, Co-Head of Global Client Development
ptorrey@strategicgroup.com
Tel: (703) 236-1757 / Cell: (610) 724-3926

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93. **Summit Rock Advisors**, New York, NY
$28.8bn discretionary assets (avg. client $550mm)
David Dechman, CEO & co-Founder
david.dechman@summit-rock.com
(212) 993-7160

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94. **Syntrinsic**, an IMA Company, Denver, CO
$2.41bn discretionary assets
$3.3bn total
Jim Brauer, MD, Investor Relations and Consulting
jim.brauer@syntrinsic.com
(303) 518-6370

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95. **The Family Office at Synovus**, Columbus, GA
$9.5bn discretionary assets
$12.0bn AUA
Walt Deriso, Chief Executive Officer
waltderiso@synovus.com
Mike Sluder, CIO
michaelsluder@synovus.com
(706) 644-2063

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96. **The Haverford Trust Company**, Radnor, PA
$3.5bn discretionary assets
$16.9bn total
Timothy Hoyle, CIO
thoyle@haverfordquality.com
Maxine Cuffe, Director of Global Strategies
mcuffe@haverfordquality.com
(610) 995-8700

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97. **Third Lake Partners**, Tampa, FL
$6.0bn discretionary assets
Case Fell, CIO

cfell@thirdlake.com
Mercer Borden, Senior MD OCIO team
mborden@thirdlake.com
(813) 497-3300

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98. TIFF Investment Management, Radnor, PA
$9.3bn discretionary assets
$11.9 total
Kane Brenan, CEO
kbrenan@tiff.org
Jessica Portis, Chief Client Officer
jportis@tiff.org
(610) 684-8200

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99. Torreyana Capital, La Jolla, CA
$1bn discretionary assets
Kris Ostrander, CEO
kostrander@torreyanacapital.com
(510) 410-1230

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100. U.S. Bancorp Asset Management, Inc., Philadelphia, PA
$33.1bn discretionary assets
$445.4bn total discretionary assets
Jim Link, Head of Institutional OCIO and Liquidity Services
valentine.link@usbank.com
Michael Murray, MD
michael.murray3@usbank.com
(224) 633-8309

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101. Verger Capital Management, Winston-Salem, NC
$3.6bn discretionary assets
Michael Collins, MD
mcollins@vergercapital.com
(336) 934-4101

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102. Wealthspire Institutional, New York, NY
(Fiducient Advisors Rebrand Oct 2026)
$83.6bn discretionary assets
$466.4bn advisory
Mike Chase, Head of Endowments, Foundations, OCIO
mike.chase@wealthspire.com
Chris Coleman, Managing Director, Enterprise Growth
chris.coleman@wealthspire.com
(800) 260-5445

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103. Wespath Institutional, Glenview, IL
$6.3bn discretionary assets
T. Joseph Halwax, MD Institutional Services
jhalwax@wespath.org
(847) 866-4307
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104. Willis Towers Watson, Chicago, IL
$201bn 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
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105. Wilmington Trust, Wilmington, DE
$99.9bn discretionary assets
Patrick Decker, Head of Institutional OCIO
pdecker1@wilmingtontrust.com
(610) 773-6120
(610) 977-4079 Direct
(610) 773-6120 Cell
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106. Wilshire Advisors, Santa Monica, CA
$221bn total AUM
$1.6 trillion advisory
Leah Emkin, Chief Client Officer
lemkin@wilshire.com
(310) 260-6689
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106 Firms - $6.3 trillion OCIO AUM

Appendix

Companies grouped by OCIO AUM

(as of June 30, 2026)

Over $100bn (16)
$846,230,000,000 – Marsh

$540,700,000,000 – Goldman Sachs
$445,000,000,000 – BlackRock
$418,000,000,000 – Russell Investments
$353,200,000,000 – Morgan Stanley
$320,000,000,000 – CAPTRUST
$264,200,000,000 – State Street Global Advisors
$242,400,000,000 – J.P. Morgan Asset & Wealth Management
$222,200,000,000 – AON
$221,000,000,000 – Wilshire Associates
$220,620,000,000 – SEI Institutional Group
$201,000,000,000 – Willis Towers Watson
$154,300,000,000 – NEPC
$127,200,000,000 – Bank of America
$116,800,000,000 – Cambridge Associates
$102,400,000,000 – Northern Trust
$4,795,250,000,000

$50bn – $99.9bn (9)
$99,900,000,000 – Wilmington Trust
$84,000,000,000 – Partners Capital Investment Group
$83,600,000,000 – Wealthspire Institutional
$81,400,000,000 – Pathstone
$75,000,000,000 – Regions Asset Management
$69,000,000,000 – Alan Biller and Associates
$65,000,000,000 – Brown Brothers Harriman
$58,700,000,000 – Callan
$58,520,000,000 – PNC Bank
$675,120,000,000

$20bn – $49.9bn (18)
$42,000,000,000 – Jasper Ridge Partners
$40,700,000,000 – Franklin Templeton
$36,320,000,000 – Strategic Investment Group

$36,100,000,000 – BBR Partners
$34,000,000,000 – Marquette Associates
$33,100,000,000 – U.S. Bancorp Asset Management
$31,000,000,000 – CornerStone Partners
$29,200,000,000 – Meketa Fiduciary Management
$28,800,000,000 – Summit Rock Advisors
$27,870,000,000 – Fidelity Institutional
$25,700,000,000 – Hirtle & Co.
$24,000,000,000 – Silvercrest Asset Management
$23,800,000,000 – Citi
$23,200,000,000 – Cerity Partners OCIO
$23,000,000,000 – Makena
$22,900,000,000 – BNY Advisors
$22,300,000,000 – Principal Asset Management
$21,000,000,000 – Investure
$524,990,000,000

$10bn – $19.9bn (10)
$18,100,000,000 – Commonfund
$16,700,000,000 – FEG Investment Advisors
$14,400,000,000 – RockCreek (Brown Advisory 2026)
$13,560,000,000 – Gallagher Fiduciary Advisors
$13,400,000,000 – Global Endowment Management
$12,524,000,000 – Bridges Trust
$12,500,000,000 – Glenmede
$11,600,000,000 – Ferguson Wellman CM
$11,100,000,000 – Clearstead Advisors
$11,100,000,000 – F.L. Putnam IMC
$134,984,000,000

$5bn – $9.9bn (16)
$9,500,000,000 – The Family Office at Synovus
$9,300,000,000 – TIFF Investment Management

$9,200,000,000 – Lazard Family Office Partners
$8,300,000,000 – Highland Associates
$8,100,000,000 – Spider Management Company
$7,787,000,000 – Angeles Investment Advisors
$7,700,000,000 – McMorgan & Company
$7,600,000,000 – Gerber Taylor
$7,000,000,000 – Brown Advisory
$7,000,000,000 – Ehrenkranz Partners
$7,000,000,000 – Prime Buchholz
$6,300,000,000 – Canterbury Consulting
$6,300,000,000 – Wespath Institutional
$6,200,000,000 – Guardian Partners
$6,000,000,000 – Third Lake Partners
$5,930,000,000 – Alesco Advisors
$119,217,000,000

$1bn – $4.99bn (31)
$4,868,000,000 – Cynosure Capital Management
$4,800,000,000 – Cornerstone Advisors
$3,600,000,000 – Verger Capital Management
$3,500,000,000 – The Haverford Trust Company
$3,200,000,000 – Capricorn Investment Group
$3,200,000,000 – Disciplina
$3,200,000,000 – Newport Capital Group
$3,170,000,000 – GuideStone Investment Services
$3,000,000,000 – Inatai Investment Management
$2,800,000,000 – Prodigy Asset Management
$2,500,000,000 – Morgan Creek Capital Management
$2,410,000,000 – Syntrinsic Investment Counsel
$2,360,000,000 – LCG Associates
$2,300,000,000 – Brockenbrough
$2,300,000,000 – Sellwood Consulting (a Wealthspire Company)
$2,200,000,000 – Clearbrook Global Advisors
$2,200,000,000 – ICG Advisors
$2,140,000,000 – Northside Capital Management

$2,000,000,000 – Crewcial Partners
$1,900,000,000 – Beacon Pointe
$1,900,000,000 – Multilateral Endowment Mgmt Co. (MEMCO)
$1,800,000,000 – HighGround Advisors
$1,800,000,000 – PermCap Investment Office
$1,776,000,000 – Miller Investment Management
$1,700,000,000 – Global Strategic Investment Solutions
$1,500,000,000 – Fiduciary Wealth Partners
$1,300,000,000 – Asset Consulting Group
$1,245,000,000 – Atlas Capital Advisors
$1,000,000,000 – Pivotal Advisors
$1,000,000,000 – RiskBridge Advisors
$1,000,000,000 – Torreyana Capital
$73,669,000,000

Under $1bn (6)
$840,000,000 – Blue Edge Capital
$800,000,000 – Hi-Line Capital Management
$735,000,000 – Point Olema Capital Partners
$711,000,000 – Harpswell Capital Advisors
$500,000,000 – Cornerstone Portfolio Research
$493,000,000 – Holt CIO
$4,079,000,000
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$6,327,309,000,000 – Total