

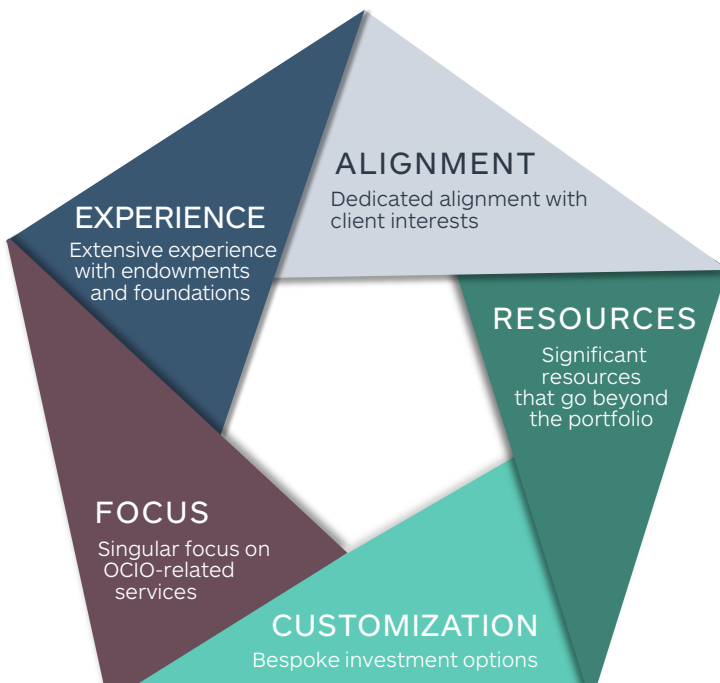
OVERVIEW

Our team has provided Outsourced CIO services to a select group of endowments and foundations since inception in 2007. Cerity Partners OCIO works closely with a limited number of clients to develop and execute customized investment solutions. By providing the dedicated resources, expertise, and ongoing oversight that prudent management of long-term assets demands, we strive to make each client feel as if it has its own in-house investment team.

PHILOSOPHY

We start by understanding the return goals, risk tolerance, and unique needs of each client. We then construct a portfolio designed to best meet those needs. Clients benefit from our extensive resources, including dedicated investment, accounting, operations, client service, and legal personnel. We work closely with clients on a variety of other projects, from help with audit needs to donor relations.

WHY CERITY PARTNERS OCIO?



CAPABILITIES

- Multi-asset class portfolio solutions that leverage a global network of managers.
- Customized portfolios tailored to each client's unique situation.
- Specialty mandates that incorporate environmental, social, and governance (ESG) and mission-aligned investing.

BY THE NUMBERS

AS OF JUNE 30, 2024

Number of clients	49
Total AUM ¹	\$17.0B
Avg. years of partner experience	28
Colleagues	54
CFA charterholders ²	16
Investment team professionals	25
Support team professionals	29

1. AUM as of 6-30-24.

2. CFA[®] and Chartered Financial Analyst[®] are registered trademarks owned by CFA Institute.

OUR PARTNERS

CHRIS BITTMAN

TREY THOMPSON, CFA

KENT MUCKEL, CFA

AMITA SCHULTES, PH.D

DARREN MYERS, CFA

FRANCES NI

PREVIOUS EXPERIENCE

- CIO, University of Colorado Foundation
- President & CEO, Jurika & Voyles
- Western Regional Manager, Merrill Lynch Business Financial Services Group
- Managing Director, University of Texas Investment Management Company
- Prudential Capital Group
- Goldman Sachs
- CIO, Baylor University
- Senior Portfolio Manager, University of Colorado Foundation
- Vice President and Senior Director, Qwest Asset Management Company
- Partner, Managing Director, Colonial Consulting
- Ibbotson Associates
- Salomon Smith Barney
- Senior Research Analyst, Tejas Securities Group
- Senior Analyst, University of Texas Investment Management Company
- Perry Capital
- Chief Financial Officer, ReachCapital
- Head of Finance & Assistant Controller, FrontPoint Partners, LLC
- PricewaterhouseCoopers

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