

SPECIALTY RESOURCING SERVICES DELIVERED BY EXPERIENCED ALLOCATORS

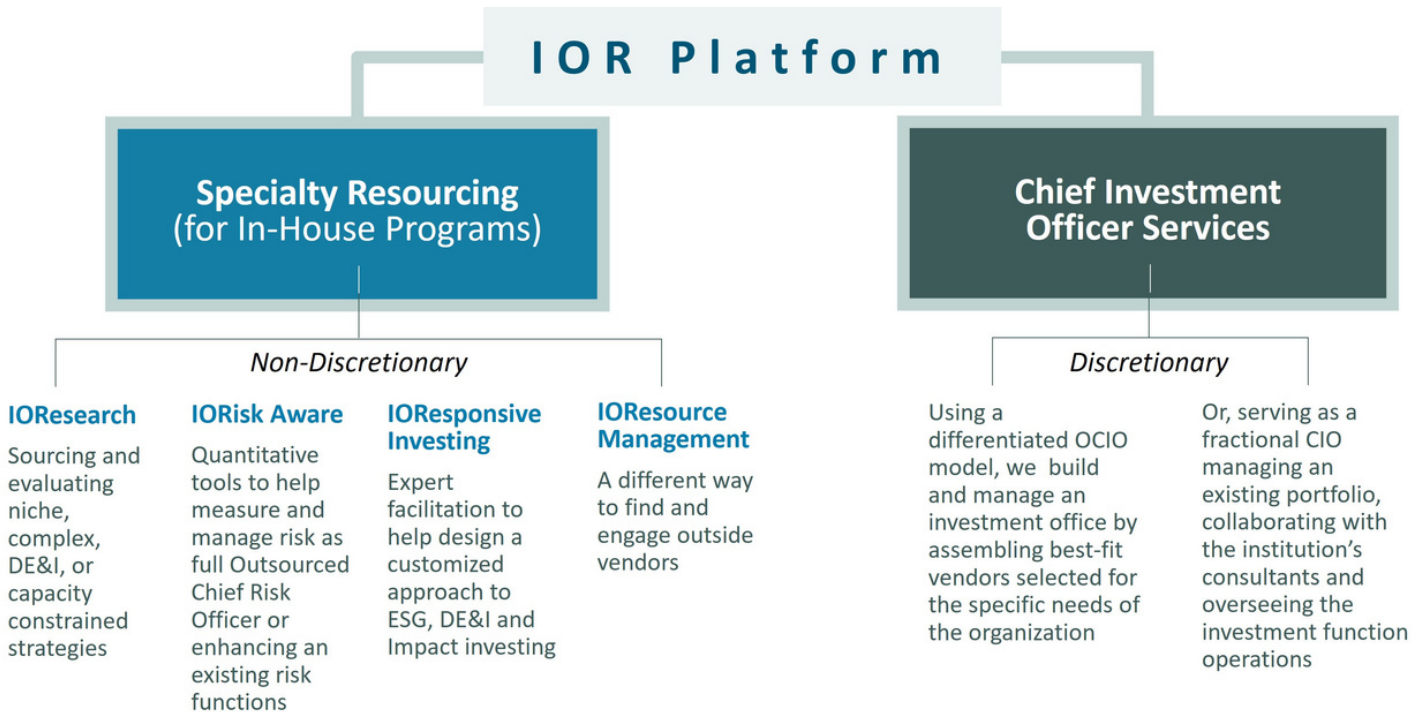
THE PROBLEM

Investment offices are facing new complexities and being asked to do more with fewer resources.

Addressing the increased investment complexities through traditional resourcing options and with tighter budgets is exposing investment offices to function gaps. CIOs and investment function leaders are seeking new and innovative tools to meet these growing demands and emerging challenges.

THE SOLUTION

IOR was launched to offer institutional investors a new resourcing alternative. IOR provides non-discretionary specialty resourcing services for the hardest to resource investment office functions and discretionary CIO Services using an differentiated, award-winning model. Our platform delivers flexible access to skills, domain expertise, specialization and sophisticated solutions that are otherwise difficult to access with traditional resourcing options.



**Combining Our Skills and Experience with Yours
In the Collaborative Pursuit of Investment Excellence**

ENGAGE WITH US:

IOResource Management

We use our allocator experience and deep knowledge of industry players to help investment offices find and contract with best-fit vendors and/or other needed resources, subject matters expertise and providers of essential functions

In our experience as allocators, we found that all vendors had a core competency, but that asking one firm to fulfill all investment support functions, was not always effective.

We also found that the search and selection of talent was never easy, and that new needs, departures, retirements, budget approval delays and posting delays left vacancies for essential work that may go undone.

Vendor Selection & Management

- We help investment offices assemble and manage a mix of best fit vendors that collectively deliver robust support in needed areas of the investment function.
- We negotiate the scope and terms of vendor agreements.
- Resourcing changes can be made swiftly and easily as portfolio needs change

Temporary Needs

- We have 'stand-in' experts ready to help with any function in the investment office so that your work can continue while a permanent solution is found.

The IOR Team



Anthony Waskiewicz, CFA
Founder and CIO



Ryan Bailey, CFA, CAIA, FRM, CMT
CIO

With more than 25 years of collective experience as CIO's of award winning investment programs, Tony Waskiewicz and Ryan Bailey lead a team of talented investment professionals, most of whom have served as allocators. The team specializes in marketable securities, private investments, DE&I focused managers, ESG, SRI & Impact investing, risk management and resource management. More information is available at iorllc.com/team.

The opinions presented herein represent the good faith views of Investment Office Resources, LLC ("IOR") as of the date of this publication and are subject to change at any time. IOR was the recipient of the OCIO of the Year Award from Chief Investment Officer media in December 2021. Additional information is available upon request from IOR. This publication is not intended as investment advice. Past performance is no guarantee of future results.

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