IOR

Investment Office Resources

A NEW RESOURCING OPTION FOR INVESTMENT OFFICES

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.

IOR Platform

Specialty Resourcing (for In-House Programs)

Non-Discretionary

IOResearch

Sourcing and evaluating niche, complex, DE&I, or capacity constrained strategies

IORisk Aware

Quantitative tools to help measure and manage risk as full Outsourced Chief Risk Officer or enhancing an existing risk functions

IOResponsive Investing

Expert facilitation to help design a customized approach to ESG, DE&I and Impact investing

IOResource Management

A different way to find and engage outside vendors

Chief Investment Officer Services

Discretionary

Using a differentiated OCIO model, we build and manage an investment office by assembling best-fit vendors selected for the specific needs of the organization

Or, serving as a fractional CIO managing an existing portfolio, collaborating with the institution's consultants and overseeing the investment function operations

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

ENGAGE WITH US:

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IORisk Aware

Team Lead

James Kelly
Partner and Specialist - Risk Management - IORisk Aware

James Kelly provides risk management services and quantitative analytics to IOR clients. Through his experience as both an asset allocator and asset manager, James has refined a risk management process that helps allocators align the investment portfolio with objectives. Leveraging a proprietary suite of analytical tools, James works with clients to not only measure risk, but also manage risk.

When we sat in your seat, we found that getting the quantitative data we wanted and needed was expensive and time consuming or lacked actionable insights. So we developed a solution and created something we wanted and needed, but could not find in the market.

As former CIOs working with a data scientist, we developed a suite of quantitative tools that empower asset allocators with knowledge and awareness to target risk efficiently and align portfolio positioning and manager choices and sizing with portfolio objectives

Risk Measurement Services

- **IOR**isk Aware provides allocators customized analysis at the portfolio, composite/asset class and manager levels
- We implement the full process, so you do not have to
- This is a time and budget friendly solution - little staff time is required and no outside systems need to be purchased
- Output is robust and actionable.

Full Outsourced Risk Officer Services

- IOR offers full 'Outsourced Chief Risk Officer' services that combines risk management experts and powerful risk systems to provide insights and perspective needed to optimize portfolio level, asset class level and manager level decisions
- Our service provides an easier, faster and a more cost-effective way to set-up a robust risk management function in your investment office.

The IOR Team

Anthony Waskiewicz, CFA
Founder and CIO

With more than 25 years of experience as CIO of award winning investment programs, Tony Waskiewicz leads 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.