

SPECIALTY RESOURCING SERVICES DELIVERED BY EXPERIENCED ALLOCATORS

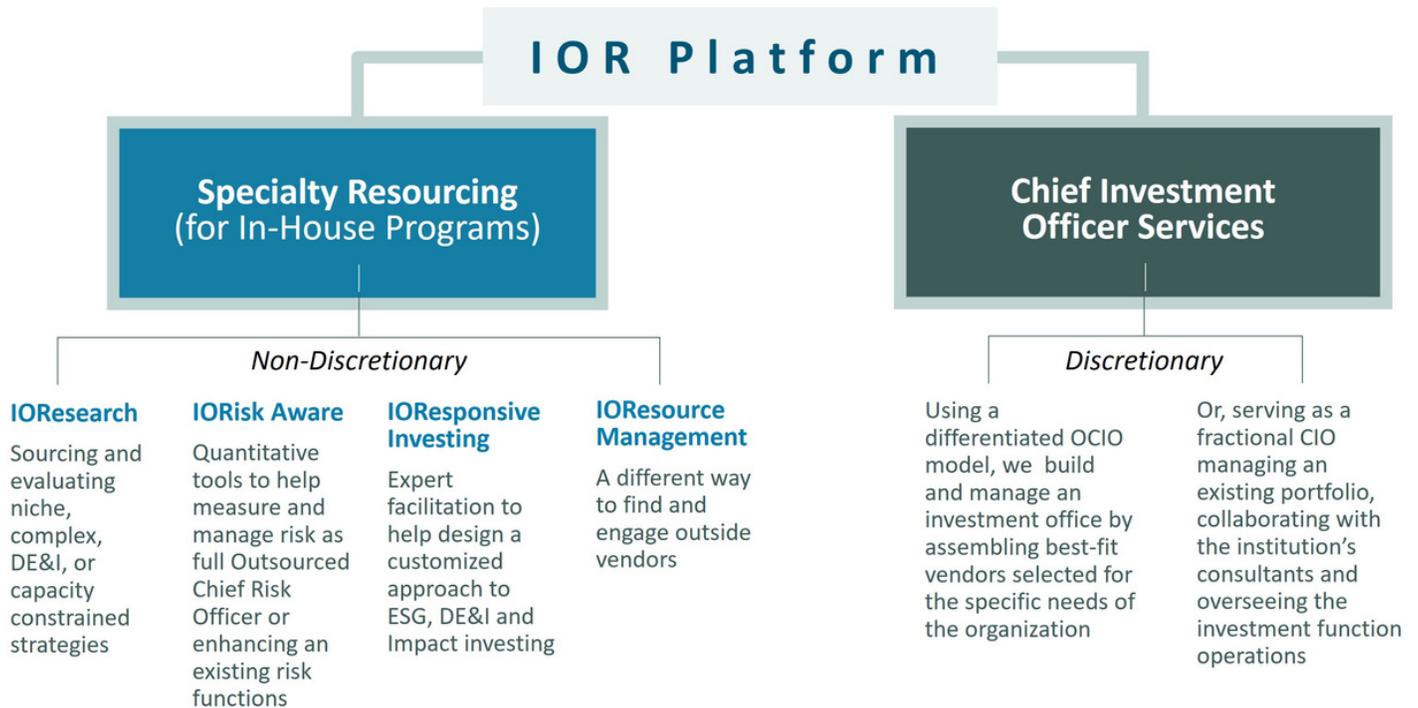
THE PROBLEM

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:

IOResponsive Investing

Team Lead



Francie Heller
Specialist - Responsive Investing

Francie Heller is a recognized industry thought leader in the values based investing space and head of IOR's responsive investing service line. Having worked with a variety of client types in senior-level roles for the past 35 years, she builds consensus among key stakeholders on what is important to the client's organization and creates a roadmap to incorporate those values into the investment portfolio.

We are a team of industry experts using a proprietary 'Playbook', a highly tailored approach and a focus on program design to help investors create an organization-specific framework to values-based and impact/mission-matching investing.

Our **IO**Responsive Investing *Playbook* was devised to help institutions design a customized approach to values-based investing

SRI and ESG Investing

- Unlike most industry service providers, we focus on program design.
- We demonstrate how values-based investing can be integrated into portfolio construction, manager selection, risk management and reporting.
- We can help find and evaluate best fit 3rd party vendors needed for implementation.

Impact and DE&I Investing

- IOR maintains a core competency in the identification and evaluation of Impact investment strategies that can advance an organization's mission, values and purpose, including DE&I focused values.
- IOR experts have managed impact funds/fund-of-funds, inclusive of objective setting and manager/product selection.

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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