

SPECIALTY RESOURCING SERVICES DELIVERED BY EXPERIENCED ALLOCATORS

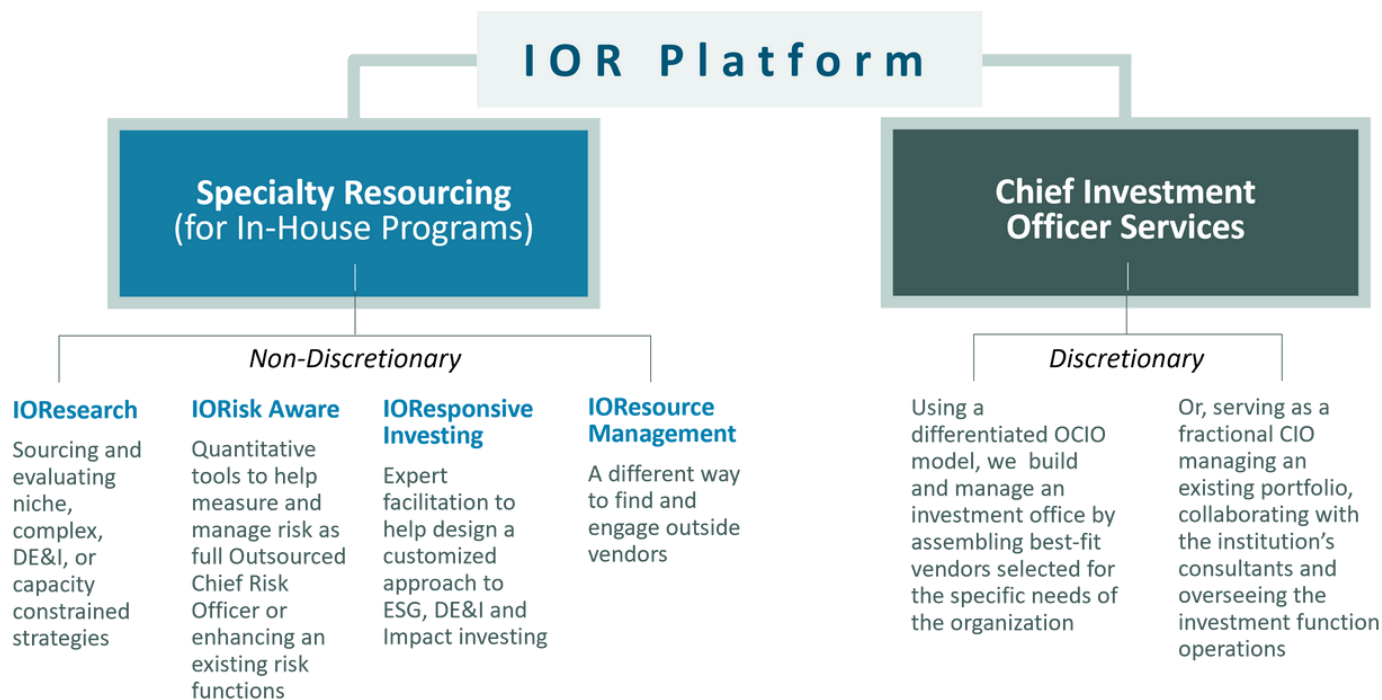
THE PROBLEM

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:

IOResearch

We serve as an expert resource for investors seeking support sourcing and evaluating managers, particularly opportunistic, non-core managers and strategies that can add-value and/or complement existing line items.

We use data and deep manager diligence experience to help you source and evaluate managers & strategies, including complex, niche or capacity-constrained managers often overlooked by traditional consulting firms

Marketable Securities

- Long-only and hedge funds sourcing is driven both by client specific areas of interest as well as the pursuit of strategies we believe warrant consideration
- Diligence services are customizable. IOR will complement your existing resources, partnering with you to serve the role most needed - from sourcing, light touch evaluation to full evaluation, including both IDD and ODD.

Private Investments

- IOR private asset specialists provide expertise and bandwidth required to effectively implement private investing mandates
- We focus on manager sourcing and evaluation, but also assist investors with portfolio construction and overall strategy or approach to private investing
- Our expertise spans into specialty strategies such as venture, impact and non-US.

DE&I Focused

- IOR maintains a core competency identifying, sourcing, evaluating and selecting managers and GP's with diverse ownership
- Our services include the full range of services from assisting organizations in the design of a DE&I focused approach to implementation, including diligence and oversight of managers.

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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