

CIO SERVICES DELIVERED BY EXPERIENCED ALLOCATORS

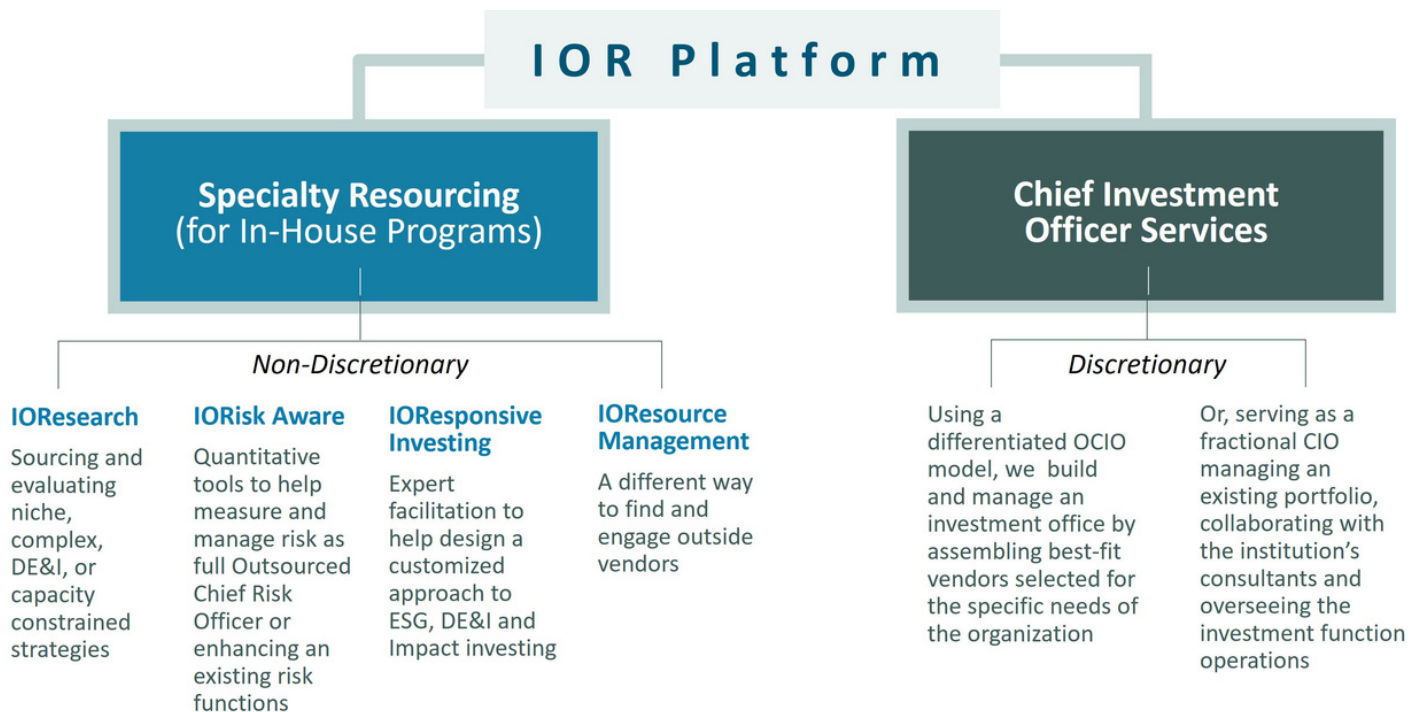
THE PROBLEM

More institutions are seeking to preserve some control of the investment process in order to maintain the level of customization desired, but are reporting that many traditional OCIO platforms are not able to adapt to the specific needs of the investing organization.

IOR was launched to address this emerging gap.

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.



We support your pursuit of excellence by adding expertise, optimizing your time and budget, increasing efficiency and improving outcomes.

ENGAGE WITH US:

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IOR CIO Services: A New Option

We build and operate a high functioning investment program tailored to your needs.

IOR's CIO Services is an award-winning service led by seasoned CIO's who build and operate a high functioning investment office tailored to the needs and objectives of the institution.

Access to Experienced CIOs

- We offer access to award-winning CIOs with significant experience managing investment portfolios, working with boards/committees and operating in-house investment functions.
- We can oversee, manage and coordinate all investment functions, working with stakeholders, existing consultants, custodians, auditors and other existing vendors.

We Custom-Build and Manage Tailored Investment Programs

- IOR uses internal and external resources to build customized investment programs tailored to the needs of an organization.
- IOR maintains expertise in alternative investments, risk management and ESG/DE&I/Impact investing and augments these capabilities through thoughtful selection of external vendors.

IOR provides institutions with an experienced CIO to help design, build, operate and maintain a high-functioning investment program tailored to the needs and objectives of the institution without the overhead of maintaining a full-time, in-house investment staff.

IOR selects and/or manages best-fit vendors suited to the specific needs of the investment mandate. The capabilities of external vendors are combined with the proprietary expertise of the in-house team to create a robust investment function.

Using this model, IOR offers institutions a unique CIO service that blends the acumen and investment expertise of an experienced CIO and senior team with customized, open architecture institutional investment support in a transparent and cost-effective fee structure.

This innovative solution earned IOR "OCIO of the Year" honors by Chief Investment Officer Magazine.

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.

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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