

IOR Press Release June 15, 2021

Investment Office Resources, LLC “IOR”, is announcing the public launch of its innovative resourcing platform. IOR comes to the market with a unique and first of its kind platform designed to help Chief Investment Officers and investment office leaders enhance and expand the organization’s in-house investment capabilities.

IOR was designed by former award-winning healthcare CIO Tony Waskiewicz to provide investment offices a new resourcing option. This new option offers an innovative solution for investment teams needing to add bandwidth, specialization and sophistication with easy, flexible and budget-friendly structures. Until now, CIOs and investment office leaders had only two choices to enhance or expand the capabilities of the investment office - hire permanent staff and/or engage a consultant. IOR gives in-house teams one more resourcing alternative. “We created a resourcing option that we wanted and needed but could not find while serving as a CIO”, says Mr. Waskiewicz about the purpose of forming IOR. “Plus, serving mission-focused organizations is a passion for me and the experts on the IOR team. There is no greater reward than collaborating with and making a difference for others”.

Joining Mr. Waskiewicz at IOR are senior investment experts with deep allocator experience who are long-standing members of the institutional investment community. Presently the team includes Ms. Francie Heller, Ms. Dale Hunt, Mr. John Nawrocki and Mr. Matt Stefan. Supporting this team of industry specialists is a four-person strategic advisory team comprised of Mr. Ryan Bailey, Mr. Thad Glowacki, Ms. Carrie Pickett and Mr. Josh Rabuck. Full biographies of the IOR team and strategic advisors are available on the firm’s website: IORLLC.com.

IOR launched in late 2020 with four initial clients, including SSM Health, Ascension Investment Management, Missouri Foundation for Health and Mid-America Transplant.

“We are thrilled to partner with IOR” says Mark Cagwin, the investment function leader of the \$6 billion SSM Health portfolio. “By augmenting our internal team with additional subject matter experts, we are able to enhance our in-house portfolio management capabilities using a resourcing model that we could not replicate on our own. Our junior investment team members are also benefitting from the mentorship provided by the experienced specialists on the IOR team”.

“IOR is a great solution for us”, says Ascension Investment Management CIO, Dave Erickson. “Tapping into Tony’s CIO experience and his team’s subject matter expertise allows us to complement the expertise of our internal team. The IOR business model will enable us to adjust resources quickly, which is ideal for the rapidly changing investment environment. IOR’s innovative resourcing model lends itself perfectly to our ever-changing needs and complexity.”

IOR’s mission is to help clients advance their mission through the collaborative pursuit of investment excellence.

If you would like more information about IOR, please visit our [LinkedIn](#), [website](#) or contact the team at info@IORLLC.com.