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Finding the Right OCIO

GET TO KNOW OCIO

Understand why the Outsourced Chief Investment Office model has become an important and effective investment solution for many organizations.



WHAT IS AN OUTSOURCED CHIEF INVESTMENT OFFICE?

An OCIO is a specialized investment firm that supports an organization's investment committee by shouldering the weight of portfolio management and administration.

- An OCIO **replicates the experience of having an in-house chief investment officer**, supported by a deep bench of asset class specialists and a fully-staffed back office.
- An OCIO offers sophisticated analytical, modeling, and risk management systems, combined with operational, accounting, and legal services for portfolio investments.
- An OCIO does the heavy lifting of investment strategy design and implementation, accepting fiduciary responsibility and accountability for performance.



We hope you enjoyed these sample pages of **Deep Dive Module 2 - Get to Know OCIO**. If you are interested in learning more, please email us at ocio@strategicgroup.com. We would be happy to schedule a time to present one or more of the full modules to your Investment Committee or Board.

Thank you for your interest in Outsourced Chief Investment Officer services. For more in-depth information and analysis, we invite you to visit **ocio.org**.

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