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OCIO VS. OTHER OUTSOURCING OPTIONS

The success of the dedicated OCIO model has led to an increase in the number of investment committees open to outsourcing the management of their organization's portfolios. As a result, many large financial services firms have entered the outsourcing market with a wide range of products and services. Increased outsourcing presents both benefits and challenges. This module is designed to help investment committees understand how the various options compare.



THE ORIGINAL FORMULA: ICIO

The IC oversees an internal Chief Investment Officer who is supported by a deep bench of asset class, risk, and operations professionals (a "Full ICIO") dedicated primarily or exclusively to the organization's investment portfolio.



We hope you enjoyed these sample pages of **Deep Dive Module 3 - OCIO vs Other Outsourcing Options**. 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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Finding the Right OCIO

