

LARGE FAMILY Outsourced Investment Management



Outsourced Investment management at Glenmede provides large families with access to sophisticated investment management and research expertise. We work to preserve capital and provide for the real growth of an investment portfolio by customizing an asset allocation within a framework that reduces risk and maximizes expected returns. Our open architecture platform includes equities, fixed income and alternative investments such as hedge funds, real estate, private equity and commodities.

Investment Strategy and Implementation	Research	Reporting	Account Management
Investment Policy Development	Proprietary Research <ul style="list-style-type: none"> • Fundamental • Quantitative • Fixed Income • Private Investment • Manager Research 	Custom Performance and Benchmarking Reports	Client Service
Custom Asset Allocation	Strategic Partnerships with Third Party Research Providers	Consolidated Reporting	Coordination with Outside Advisors
Ongoing Manager Research and Due Diligence	Timely Market Commentaries and Insights	Online Account Access	Regular Client Visits and Communications
Manager Selection and Implementation	CIO Economic and Market Updates		Custody
Ongoing Monitoring and Tactical Rebalancing	Conference Calls, Webinars, and Seminars		
Discretionary Portfolio Management	Private Roundtables with Peer Organizations		
Public and Private Market Access			
Ongoing Risk and Liquidity Management			