



Choosing the Right Investment Manager for Your Organization

Learn More ...

Glenmede's OCIO Toolkit: A Guide to Choosing the Right Investment Manager for Your Organization will walk your investment committee through the process of deciding if an OCIO is right for your organization – and the steps to take in choosing an OCIO partner that can align with your investment objectives. Click [here](#) to download the toolkit.

Inside the Toolkit

- The reasons organizations are hiring OCIOs
- Best practices in launching a search
- Lessons learned
- The RFP process, including questions to ask when interviewing candidates and educational materials such as a sample RFP
- Appendix 1: Different oversight structures –self-management and investment consultant – and the pros and cons of each
- Appendix 2: Fee considerations when reviewing which structure is appropriate

Partnering with a trusted investment advisor like Glenmede that shares fiduciary responsibility can allow your organization to focus on its foremost priority of achieving its mission. Glenmede serves as a trusted outsourced chief investment officer (OCIO) to over 250 nonprofits and foundations.

Why Outsource?

BETTER RISK MANAGEMENT

An OCIO takes responsibility for the day-to-day investment decision-making for an organization's portfolio, acting within the guidelines set forth by an investment policy statement. Your organization can delegate investment discretion and the corresponding fiduciary responsibility to a trusted advisor experienced managing asset pools.

LACK OF INTERNAL RESOURCES

Investment committees that engage an OCIO have more time to dedicate – and focus on – their organization's strategy and mission.

ADDITIONAL FIDUCIARY OVERSIGHT

Accountability and fiduciary responsibilities can be clearly defined at the outset. An OCIO can serve as a comprehensive fiduciary partner to your organization. Examples of typical services provided are:

- investment policy development
- asset allocation modeling
- portfolio implementation and rebalancing
- financial and performance reporting
- board education

FASTER IMPLEMENTATION

An OCIO should be able to provide a quick response to market changes, personalized communications, diligent oversight, efficient delivery of services and educational resources to investment committees.

Choosing the Partner that Fits

The OCIO provider should be a partner, ensuring the appropriate people and expertise are in place to execute your organization's philosophy as you work to achieve your goals.

To help, Glenmede offers several resources to help when considering an OCIO, which can be found in our [Due Diligence Center](#) on our website, including:

- A "T" test to evaluate your OCIO options
- RFP scorecard to track potential providers across key categories
- Sample Request for Proposal (RFP), which can help an organization decide which OCIO provider is the "right" one



Glenmede as an OCIO

Since our inception in 1956, Glenmede has earned a reputation as a dedicated and dynamic OCIO. Your organization can benefit from our investment experience gained over years of sophisticated endowment-style management, a culture of continuous improvement and a shared set of values and interests.

Our Endowment & Foundation Management group serves a variety of clients, including educational institutions, healthcare and human service organizations, private and family foundations, museums and cultural institutions, and faith-based organizations.

We blend quantitative and fundamental disciplines for customized investment solutions that can align with your organization's mission, vision and values, offering actively managed equity, alternative, fixed income and mission-aligned investing strategies available through mutual funds, separately managed accounts and partnerships. We execute our investment philosophy through a three-pillar process that can be customized to your organization.

If your organization is interested in learning more about the benefits of partnering with an OCIO, please call Samantha Audia, CTFA, Business Development Director, at 215-419-6038, or email Glenmede's Endowment & Foundation Management Team at EFsolutions@glenmede.com.

This presentation is intended to be an unconstrained review of matters of possible interest to Glenmede Trust Company clients and friends and is not intended as personalized investment advice. Advice is provided in light of a client's applicable circumstances and may differ substantially from this presentation. Opinions or projections herein are based on information available at the time of publication and may change thereafter. Information obtained from third-party sources is assumed to be reliable, but accuracy is not guaranteed. Outcomes (including performance) may differ materially from expectations and projections noted herein due to various risks and uncertainties. Any reference to risk management or risk control does not imply that risk can be eliminated. All investments have risk. Clients are encouraged to discuss the applicability of any matter discussed herein with their Glenmede representative.