

MERCER HAMMOND ENDOWMENT AND FOUNDATIONS OUTSOURCED SOLUTIONS

DO YOU THINK YOU ARE GETTING THE MOST FROM ...

- YOUR CONSULTANT?
- YOUR PORTFOLIO MANAGERS?
- YOUR INVESTMENT COMMITTEE?
- THE FEES YOU PAY?

IF NOT, MERCER CAN HELP

Mercer's outsourced solution combines customized strategic asset allocation advice with a robust multi-manager structure, including top-tier alternatives managers. Mercer's team of experts provides continuous portfolio oversight through a disciplined, rigorous, and well-documented governance process.

LEVERAGING OUR HERITAGE IN CONSULTING, RESEARCH, AND IMPLEMENTATION POTENTIALLY BENEFITS YOU:

- Customize the asset allocation decision to your specific requirements.
- Dynamically adjust the allocation based on valuations.
- Use traditional and alternatives managers highly rated by Mercer.
- Receive cost savings from Mercer's scale.
- Receive real-time management and strategy execution.
- Reduce administrative burden on your committee and staff.

OUR SOLUTION

Our process begins with understanding where you are today, what your risk and return objectives are, and how we can develop a strategy and investment structure that helps meet your goals.



OUR PROCESS

STRATEGY

One of the most important decisions a committee will make and must be customized to your specific requirements.



IMPLEMENTATION

A multi-manager solution providing you with strategies expected to produce alpha and maintain diversification.



EVALUATION AND RISK ASSESSMENT

A disciplined process to proactively adjust the portfolio to meet the institution's goals.



EXECUTION

An end-to-end solution for committees to grow assets over time in a timely, disciplined, and cost-effective manner.

YOUR ADVANTAGES

Mercer combines the expertise of capital markets researchers, investment consultants, and portfolio managers to provide a customized approach based on nearly 40 years of investment consulting experience.

Your Mercer team, in conjunction with over 120 traditional and alternatives researchers in our Manager Research Group, creates diversified investment strategies comprised of specialist managers highly rated by Mercer.

We will monitor risk exposures and your managers and keep abreast of organizational changes.

Mercer will adjust the portfolio to take advantage of market opportunities as they arise. We will also consider active/passive trade-offs for each asset class and seek to manage fees effectively.

KEY FACTS

- Over 40 years working with institutional investors.
- Over 500 fiduciary clients.
- Over 140 endowment and foundation retainer clients.
- \$108 billion assets under management.
- 120+ manager researchers.

Global figures as of September 30, 2014, including worldwide assets under management across Mercer's Investment Consulting and Fiduciary Management business.

ENDOWMENT AND FOUNDATION SERVICES

- Outsourced solutions.
- Traditional consulting.
- Investment policy development.
- Hedge fund portfolio design.
- Private markets portfolio design.
- Capital markets research.
- Global manager research.
- Custodial cost and risk analysis.
- Manager cost and risk analysis.
- Responsible investing.
- 403(b) plan consulting.

For more information, please contact:

Travis Pruitt
travis.pruitt@mercer.com
 +1 617 747 9539

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