

# In This Series . . .



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Investment Governance Models



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Get to Know OCIO



**03**  
OCIO vs. Other Outsourcing Options



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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](mailto: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.

**T**hank 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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## Next Up . . .



**03**  
OCIO vs. Other  
Outsourcing Options