

Founded in 1973, LCG is a full-service, national consulting firm. Our sole focus is investment consulting. We are 100% employee-owned. LCG's goal is to provide a select number of blue-chip clients with highly-customized advice and serve as an "extension of staff." We limit the number of clients each Consultant can have to concentrate on client service and research. LCG's Research Team (42 people) devotes a significant amount of time to research activities. For research purposes, all Consultants are called Analysts and take an active role.



Independent Advice

- Our recommendations are based solely on our clients' best interest
- 100% of our revenues are paid directly by clients
- We do not receive any compensation from investment manager or broker/dealers
- We do not engage in pay-to-play relationships



Client Base & Representative Client List¹

- 95 clients nationally with \$102 billion in AUA/AUM
- 56% E&Fs/other non-profits
44% corporations/for-profits
- Client types served include pension plans, defined contribution plans, E&Fs, family offices/private wealth, healthcare organizations, and NDTs.



Our Services

- Investment policy development
- Asset allocation modeling
- Traditional asset class research
- Alternative investment research
- OCIO services
- ESG/SRI/II/MRI services
- Performance measurement
- Client education and fiduciary training

Due Diligence Meeting Process

To help coordinate due diligence meetings, LCG has established a simple meeting request process through its website. Visit LCG's website and follow 3 steps:

1. Verify/submit investment composite performance to LCG's database at: <http://www.lcgassociates.com/managers-service-providers/join-update-database/>
2. Submit meeting request on-line at: <https://www.lcgassociates.com/managers-service-providers/meeting-request/>
3. All meeting requests submitted by Thursday at 5:00 p.m. (EST) will be reviewed by LCG each Monday morning. LCG will contact your firm (either to confirm or to decline a meeting request) via e-mail by the close of business on Monday.

How does your firm's strategy rank in LCG's Investment Manager Universe? Sign up here for LCG's Quarterly Universe Newsletter and find out: <https://lcgweb.lcgassociates.com/news/subscribe.html?id=092947814d>

Contact Us:

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For inquiries, contact us at (770) 644-0100 or meetings@lcgassociates.com.
www.lcgassociates.com

¹Clients as of 4/27/21 and assets are provided as of 12/31/20.

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