

OVERVIEW

RVK, Inc. (RVK) was founded in 1985 and is one of the largest independent and employee-owned investment consulting firms in the world, as reported by *Pensions & Investments Special Report – Consultants*. We provide strategic investment advice to institutional investors with pension plans, defined contribution plans, endowments & foundations, insurance pools, and special purpose funds. In April 2021, RVK was the *only* firm to receive a Greenwich *Quality Leader Award*¹ for a fourth consecutive year.

MISSION STATEMENT

To provide best-in-class investment consulting services to a wide array of sophisticated investors.

STRATEGIC INVESTMENT ADVICE AND EXPLICIT NO CONFLICTS OF INTEREST POLICY

RVK has built its investment consulting practice on the principles of integrity, investment expertise, client service, and our no conflicts of interest policy. We are exclusively focused on strategic investment consulting services and solely owned by active employees, enabling us to offer advice that is not influenced by other business activities. As a privately-held firm with no affiliates or parent company, we are in control of our business policy, providing firm stability for clients. We offer an extensive slate of consulting services and produce deliverables fully customized to meet each client's needs.

KEY TENETS OF OUR CULTURE



RVK BY THE NUMBERS

- **35** Years of Business
- **4** offices - Portland, Boise, Chicago, New York
- **\$1** trillion Full-Retainer AUA
- **100** Investment Professionals
- **50+** Advanced Degrees and Certifications
- **100%** Employee Ownership
- **100%** Revenue Derived from Client Fees
- **100%** Non-Discretionary Services

GENERAL CONSULTING SERVICES

- Plan Evaluation
- Strategic Asset Allocation
- Investment Policy Development & Review
- Investment Manager Search & Selection
- Performance Analysis & Reporting
- Manager Structure Analysis
- Risk Monitoring and Management
- ESG / Impact Investing Advice
- Client Education
- Special Projects

SPECIALTY CONSULTING SERVICES

- Custody, Record keeper, Third-Party Administrator Searches
- Asset/Liability Studies
- Endowment Spending Policy Studies
- Securities Lending Reviews
- Pacing Studies
- Strategic Planning Reviews
- Outsourced CIO (OCIO) Searches, Evaluation, and Ongoing Monitoring
- Directed Consulting Services
- Fee Reviews
- Defined Contribution Solutions Services
- Investment Operations Solutions
- Board and Investment Program Operational Reviews

**FOR MORE INFORMATION ABOUT OUR SERVICES, PLEASE CONTACT:
Business.Development@RVKInc.com 503-221-4200**

¹Between July and October 2020, Coalition Greenwich conducted interviews with 856 senior professionals at 704 of the largest tax-exempt funds in the US—including corporate and union funds, public funds, endowments and foundations, insurance general accounts, and healthcare organizations—with either pension or investment pool assets greater than \$150 million. Study participants were asked to provide quantitative and qualitative evaluations of their asset managers and investment consultants, including qualitative assessments of those firms soliciting their business and detailed information on important market trends. RVK is one of three firms recognized in the large investment consultant category. The ratings may not be representative of any one client's experience with RVK; rather, they are representative of those clients that chose to participate in the survey. The results are not indicative of RVK's future performance.