

## CONSULTANT PROFILE FOR AIMSE 2019

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**NAME OF INVESTMENT CONSULTING FIRM:** **Gallagher Fiduciary Advisors**

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*\* Please limit the profile to three pages. We would appreciate you including any organization charts on research and field consultant structure.*

FIRM OVERVIEW (History of the firm, office locations, client type/region, etc)

*Gallagher Fiduciary Advisors, LLC (“Gallagher”) is the Institutional Investment & and Fiduciary Services Consulting practice of Arthur J. Gallagher & Co. (NYSE: “AJG”). Gallagher provides investment consulting and decision-making services to 176 clients with 328 pools of assets totaling approximately \$65 billion, which includes assets for individual projects, assets where we provide discretionary services for a portion of or an entire portfolio, and assets where we act as an advisor or decision-maker in our fiduciary decision-making practice.*

KEY CONTACTS / LEADERSHIP - NAVIGATING INSIDE OUR FIRM

*Gallagher is led by Area President Michael Johnson, In addition, Gallagher maintains a Leadership Team which assures that the overall direction and focus of the organization remains united across the office locations. Key contacts for investment managers are best achieved through each of the respective asset class teams described below.*

MANAGER RESEARCH PROCESS – RATING SYSTEM - DATABASE USED

*Gallagher approaches manager research through the integration of six asset class teams covering: U.S. Equity, International/Global Equity, Fixed Income, Real Assets, Hedged Strategies, and Private Markets. Each asset class team is composed of a team investment consultants & analysts, led by a senior member of the firm. All asset class recommendations are subject to final approval by the firm’s internal research committee. All requests pertaining to asset class/manager research should be addressed to the appropriate team through the ‘Investment Manager Meeting Request’ tool available through the following link:*

<https://www.ajg.com/us/services/investments-fiduciary-consulting/>

## CURRENT CLIENT INTERESTS & MARKETPLACE TRENDS

*Ongoing within the six defined asset class teams.*

## SEARCH ACTIVITY (Current & Anticipated) – Please include areas of no interest/activity

*Gallagher develops custom portfolios across it's' book of business. Search activity can occur for a number of reasons in the custom solutions developed for clients. We maintain ongoing due diligence through each of the respective asset class teams. If there are any concerns regarding a particular strategy, client teams address with the corresponding asset class team to discuss if further due diligence is required.*

## WHAT IS ON THE FIRM'S RESEARCH AGENDA

*Ongoing within the six defined asset class teams.*

## ANY SIGNIFICANT ADDITIONS OR DEPARTURES IN THE FIRM?

*No*