**CONSULTANT PROFILE FOR AIMSE 2022**

**NAME OF INVESTMENT CONSULTING FIRM: Verus Advisory**

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

**DIFFERENTIATING FEATURES**

* Employee-owned
* Experienced consultants – 22 years average experience
* 95% of senior consultants are shareholders
* High-touch client service model
* High degree of customization
* Diverse client base:
  + Public, corporate and Taft-Hartley pensions
  + Endowments and Foundations
  + Healthcare and Insurance
* 154 clients
* $660 billion AUA
* 66% of clients have been with Verus for >10years

**MANAGER RESEARCH CONTACTS BY ASSET CLASS**

**Public Markets**

Marianne Feeley, CFA

Managing Director and Head of Manager Research

**U.S. Equity**

Vincent Francom, CFA, CAIA

Sneha Pendyala

**Non-U.S. Equity**

Marianne Feeley, CFA

David Greenwood, CFA

**Fixed Income and Currency**

Maggie McRae Hoy, CFA, CAIA

Peter McConville, CFA

**Hedge Funds**

Paul Kreiselmaier, CFA

Trevor Parmelee, CFA, CAIA

**Generalists**

Stephen Reller

Kyle Jangard

**Private Markets**

Faraz Shooshani

Managing Director and Head of Private Markets

**Equity**

Steve Hempler

**Real Assets**

John Nicolini, CFA

John Wasnock

**Credit**

Chris Shelby

**Generalists**

Kin Lam

Jing Chen

Vincent Phan

Garrett Dinsmore

Matt Foppiano

**AREAS CLIENT INTEREST / CONCERN**

* Interest
  + Private Credit
  + Hedge funds
  + Risk mitigation alternatives to fixed income
  + Diverse firms
* Concern
  + EM (Russia / China)
  + Fixed Income (yields)
  + Equity (declining earnings, valuations)

**MANAGER SEARCH TRENDS**

* Private credit remains an area of much search activity
* Opportunistic credit is also getting attention
* Virtual meetings more accepted than pre-COVID, but face-to-face meetings picking up post-COVID

**ASSET CLASSES WHERE YOU WOULD LIKE TO SEE MORE PRODUCT AVAILABILITY**

* None