**CONSULTANT PROFILE FOR AIMSE 2022**

**NAME OF INVESTMENT CONSULTING FIRM: LCG Associates, Inc.**

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

**DIFFERENTIATING FEATURES**

*Client Focused*

1. Select number of clients by design
2. Customized portfolios
3. High touch service / extension of staff

*Experienced & Stable Team*

1. Senior Analyst average experience: 28 years
2. Minimal Senior Consultant Turnover

*Firm of Analysts*

1. Senior-led research
2. No disconnect between research and clients
3. Best thinking of the firm

*Independence*

1. Conflict-free, unbiased advice
2. Broadly diversified ownership
3. In business for 49 years

**MANAGER RESEARCH CONTACTS BY ASSET CLASS**

At LCG, all consultants are analysts and everyone is a generalist in terms of research. Investment managers can reach out to anyone on the team; however, we do have three directors of research to help coordinate the research process.

* Eric Huff, CFA, CAIA, Vice President, Senior Consultants, Director of Marketable Investments
* Catharine Burkett, Vice President, Co-Director of Private Investments
* Taylor Covey, CAIA, Vice President, Co-Direct of Private Investments, Senior Consultant

**AREAS CLIENT INTEREST / CONCERN**

*Interests*

1. Alternatives to fixed income/private debt
2. Private equity
3. ESG
4. Impact and DE&I

*Concerns*

1. Negative returns in both equities and fixed income
2. Inflation
3. Path of interest rates/Fed making a “soft” landing
4. Clients being able to achieve their annual goals
5. International equity and emerging markets
6. Venture capital (valuations)

**MANAGER SEARCH TRENDS**

1. Privates (debt and equity)
2. Higher yielding / income focused strategies

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

1. More liquid, higher income strategies