

Verus claims compliance with Global Investment Performance Standards (GIPS®)

SEATTLE, WA – April 21, 2020 – Verus Advisory, Inc. (Verus), a leading investment consulting and OCIO provider, announced that it is now claiming compliance, firm-wide, with the Global Investment Performance Standards (GIPS®) in accordance with 2020 edition of the GIPS standards.

Verus completed the voluntary, and rigorous, process of having its claim of compliance verified by an independent party for the period January 1, 2015 – December 31, 2019. Verification provides assurance that our policies, procedures, and performance disclosures have been tested to adhere to the ethical standards and best industry practices required by the GIPS standards.

“Few investment consulting firms can claim GIPS verification, so it makes us proud to have succeeded with this meticulous process and getting a stamp of approval,” said Shelly Heier, president of Verus. “Attaining GIPS compliance is not just about consistency with how performance is calculated, but also about transparency regarding the influence of different risk levels on performance.”

Verus established its OCIO business in 2011 by offering an OCIO service that does not rely on model portfolios but creates custom solutions that are tailored to each client. GIPS compliance is viewed as an organic element of its OCIO model, which emphasizes transparency, adding value to clients by ensuring the integrity of its performance evaluation practices.

Cascade Investment Compliance & Verification, LLC, conducted the review and verification of GIPS compliance. GIPS compliance consultant Guardian Performance Solutions, LLC, assisted Verus with establishing processes and systems required to meet compliance.



About Global Investment Performance Standards (GIPS®)

The Global Investment Performance Standards (GIPS®) are a set of standardized, industry-wide ethical principles that guide investment managers, asset owners, and other discretionary service providers on how to fairly calculate and present their investment results and historical track record. Introduced in 1999, and with new edition effective January 1, 2020, the GIPS standards are designed to promote full disclosure, uniformity, fair representation of investment performance results, performance transparency, and comparability.

About Verus

Verus Advisory, Inc. (Verus) is an independent, employee-owned provider of non-discretionary consulting and discretionary management (OCIO) services. Since 1986, Verus has been helping institutions achieve their investment goals through services that combine empirical research, customized advice, and personalized client service. Today Verus advises on over \$438 billion* in client assets for a wide range of clients including educational and charitable organizations, corporate, multi-employer and public defined benefit and defined contribution plans, hospitals, insurance providers, and private wealth trusts.

**Includes Verus' total assets under advisement; preliminary as of 4/1/2020.*

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