



Verus names 14 new shareholders, expanding ownership base

Seattle, WA, July 14, 2020 – Verus, a leading provider of investment consulting and OCIO services, is pleased to announce the addition of fourteen new shareholders, effective July 15, 2020, which would expand the ownership base of the company to 30 owners.

“One-third of our employees are now owners of the firm,” said Jeff MacLean, CEO of Verus. “We have always taken pride in being a 100% employee-owned company because our independence as an organization makes us better consultants for our clients. We are especially proud of this new generation of owners whose accomplishments as consultants, analysts, and researchers have contributed significantly to our clients’ success.”

The new shareholders of Verus, listed below, have been selected from different areas of the company: consulting, research, risk advisory, performance measurement, and marketing.

Consulting

Mark Brubaker, CFA, Managing Director, heads the newly established Pittsburgh office and is a consulting industry veteran with 30 years of experience consulting to some of the largest institutional investors in the country.

Ted Hermann, Managing Director, is based in the Pittsburgh office and oversees the firm’s business development initiatives in the eastern region.

Michael Kamell, CFA, CAIA, senior consultant in the Los Angeles office, advises multiemployer trusts and corporate defined benefit and defined contribution plans and is an LDI strategy specialist.

Brian Kwan, CFA, CAIA, senior consultant in the Los Angeles office, advises corporations and multiemployer trusts on their retirement plan and health benefit plan investments.

Victor Lee, senior consultant in the Seattle office, is a 30-year veteran of the firm who consults mainly to non-profit organizations and corporate pension plans. He is a defined contribution consulting specialist.

Jason Moss, Managing Director, is based in the Seattle office and leads the firm’s institutional business development efforts in the western region.

Jason Taylor, Managing Director, is an endowments and foundations consultant in the Seattle office who also plays a key role in the firm’s initiatives for ESG, SRI, and impact investing.

Research

Marianne Feeley, CFA, Managing Director, heads Public Markets Research and oversees asset class coverage and due diligence of vast segments of long-only traditional investments and hedge funds.

Vincent Francom, CFA, CAIA, Director of Public Markets, has 26 years of investment experience and leads research coverage of domestic equity managers and investment products.

Thomas Garrett, CFA, FRM, CAIA, Director of Strategic Research, is primarily responsible for providing thought leadership on the firm's global capital markets research, including the development of annual capital risk and return assumptions and asset class correlations.

John Wasnock, Senior Associate Director for Private Markets, focuses on providing research coverage of private real estate and real assets managers and investment products.

Risk Advisory

Danny Sullivan, FRM, CAIA, Director of Risk, provides risk consulting and is responsible for the development of Verus' distinctive risk-oriented framework for defining investment objectives, governance, portfolio construction, and monitoring.

Performance Measurement

Justin Hatley, Director of Performance Analytics, heads Verus' 13-person performance evaluation team and oversees the delivery of GIPS-compliant reporting and attribution of investment performance results.

Marketing

Margie Lane, Director of Marketing, oversees the development and implementation of the firm's marketing strategy, branding, corporate sponsorships, and participation in industry events.

About Verus

Verus Advisory, Inc. (Verus) is an independent, employee-owned provider of non-discretionary consulting and discretionary management (OCIO) services since 1986.

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