PERSPECTIVES THAT DRIVE ENTERPRISE SUCCESS

Verus®

We are stewards of the means to a better life.

Success at what we do preserves and elevates the wellbeing of individuals, families, and communities. We rely on objective observation, rigorous research, demonstrable facts, and measurable results to help guide our clients. Yet the true value of our work lies beyond what can be measured – what we do impacts people's lives.

This is our story

For over 37 years, Verus has been providing research-driven investment solutions that enable institutions to prudently discharge their fiduciary responsibility. With a deep understanding of our clients' circumstances, we apply our knowledge, insight and experience to help them achieve their enterprise objectives.

Today we advise on over $952 billion in client assets*. We service a broad range of clients including educational and charitable organizations, corporate, multi-employer and public defined benefit plans, hospitals and insurance providers.

Though our business has evolved, we continue to be driven by the same values our founder, William Wurts, established in 1986: the quality of our people, the principled nature of our culture, the insights of our research and above all, our determination to serve our clients well. To meet their long-term obligations, institutions must achieve long-term investment goals. Our role is to help them succeed.

Our services

Our services include independent advice through our non-discretionary consulting, private markets, and risk advisory service offerings. For institutions who choose to delegate more of their fiduciary responsibility, we also provide discretionary Outsourced CIO services.

Sharing our insights

In recent years, the environment for institutional fiduciaries has become more complex with more volatile markets, an increasingly interconnected global economy and the introduction of new financial instruments, making independent and professional guidance more necessary than ever before.

Unconstrained by conventional thinking and industry consensus, Verus investment professionals follow the data until it leads to insight, and turn insight into ideas that benefit our clients - ultimately resulting in a more robust approach to portfolio design and opportunity capture.

Verus by the numbers

100% EMPLOYEE OWNED

5 OFFICE LOCATIONS

Seattle, Los Angeles, San Francisco, Pittsburgh, Chicago

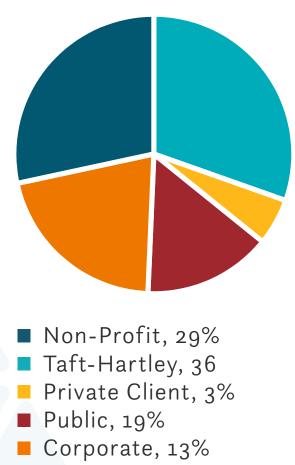
92 EMPLOYEES

81 INVESTMENT PROFESSIONALS

156 CLIENT RELATIONSHIPS

$952 BILLION IN ASSETS*

Breakdown by client count



*Includes Verus' total assets under advisement; preliminary as of 10/1/2023.

The firm

VERUS

Services offered

Through an independent approach to investment analysis, we offer our clients up-to-date research and advice designed to help them achieve their enterprise objectives.

Non-Discretionary Consulting

— An experienced team of investment professionals consult and assist in designing investment policies and portfolio allocations customized to the clients' investment objectives and risk capacity

— Services also include investment manager evaluation, consultation and recommendations, staff and committee education, and portfolio performance monitoring

Outsourced CIO (OCIO)

— For clients who choose to delegate the implementation of their investment policy, we offer highly customized and comprehensive solutions

— As a hands-on OCIO team, we eliminate the barriers associated with quarterly vetting, approval and review processes and incorporate the advantages of daily market evaluations, live portfolio, and management tools

Additional services

Risk Advisory

— Designed for large fund sponsors who appreciate the importance of incorporating risk into investment decisions

— Complete implementation of a holdings-based risk system that reveals governance and policy actions

— Our proprietary risk management tools are designed to minimize surprises through improved communication. Reports provide clients a high level of visibility into their portfolios

Private Markets

— Our seasoned consulting team, solely dedicated to private markets, specializes in strategic planning, policy implementation and monitoring

— Integration with general consultants positions our private markets team to assess overall asset allocation strategies and align with risk factor goals

— Focused on achieving long-term return objectives, we emphasize careful manager selection

Leadership

Jeffrey MacLean
Chief Executive Officer

Shelly Heier, CFA, CAIA
President

Kraig McCoy, CFA
Chief Financial Officer, Chief Operating Officer

Ian Toner, CFA
Chief Investment Officer

Scott Whalen, CFA
Executive Managing Director

Faraz Shooshani
Managing Director

Mark Brubaker, CFA
Managing Director

Anne Westreich, CFA
Managing Director

Annie Taylor, CFA
Managing Director

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