

INVESTMENT OUTSOURCING



Russell Investments is dedicated to helping Defined Contribution (DC) plan sponsors in their quest to help improve retirement outcomes for their participants. Our experience and depth of resources in consulting, investment management, manager research, and portfolio implementation allow us to provide a wide range of innovative outsourced CIO (“OCIO”) solutions to our defined contribution clients.

Customizable DC solutions

We offer comprehensive investment services for your defined contribution plan.

A complete range of fiduciary options

	MANAGER RESEARCH	INVESTMENT MANAGEMENT	GLIDE PATH METHODOLOGY	PARTICIPANT COMMUNICATIONS	RECORDKEEPER SEARCH	
COMPLETE FIDUCIARY SOLUTIONS	✓	✓	✓	✓	✓	↑ INCREASING LEVELS OF FIDUCIARY CONTROL AND ACCOUNTABILITY
LIFEPOINTS TARGET DATE FUNDS	✓	✓	✓	✓		
CUSTOM GLIDE PATH MANAGEMENT		✓	✓	✓		
STANDALONE MULTI-ASSET OPTIONS	✓	✓				
INVESTMENT CONSULTING	✓					

Investment management

Since 1980, we’ve been hiring some of the best managers identified through our research and packaging them in our investment funds. We closely monitor their ongoing performance, making changes when necessary.

We can also handle all aspects of performance reporting and administration, as well as trust and custodial services either on an asset class by asset class basis, or as part of an OCIO solution.

By the numbers

\$274.3 billion
global assets under management

\$214.9 billion[†]
DC assets under advisement, global

\$7.1 billion
DC assets under management, U.S.

\$7.3 billion*
in custom glide path assignments, U.S.

83
institutional DC clients worldwide

All data as of 9/30/2022, unless otherwise noted. The numbers listed above represent the firms’ aggregate DC business. [†]As of 6/30/2022.

Our research advantage

Our manager research, asset allocation technology, portfolio design, and capital markets research are at the forefront of the investment industry, including:

338

Our professionals are directly involved in our investment process.

121

managers and analysts actively manage portfolios worldwide.

8,725

traditional and alternative investment products are scrutinized.

238

investment products used in our funds.

Proven industry leaders



Investment solutions

A well-designed DC plan will typically offer a combination of default investments for participants who wish to leave the management and monitoring of their portfolios to a professional along with other core investment options for those participants who prefer to be more personally involved. At Russell Investments, we offer both.

- **Default options:** We offer several default investment options to meet the unique needs of your plan, including the LifePoints® Institutional Target Date Strategy Funds, and custom Target Date Funds.
- **Individual funds:** We also offer a large selection of individual, institutionally-priced multi-asset funds in both traditional asset classes and real asset solutions for an efficient core investment menu.

Consulting

For over 50 years, our global network of consultants and research analysts have helped institutional investors maintain efficient and effective investment programs. We offer:

- Strategic advice customized around your DC plan's goals,
- Investment policy refinement and asset class strategy modeling,
- Capital markets insights, asset manager research, and
- Efficient implementation of investment strategies.

Our DC clients benefit from our depth and breadth of capabilities.



Market forecasts, prepared by our **CAPITAL MARKETS INSIGHTS** professionals, are used as inputs in our strategic **ASSET ALLOCATION** process



Insights from our **MANAGER RESEARCH** team help us better understand the likely performance behavior when pairing various managers.



Our target date **IMPLEMENTATION** and rebalancing process benefits greatly from the experience of Russell Investments' implementation services, one of the industry's largest transition managers.

To discuss how we can help improve your DC plan, please reach out.

Connect & Follow us

Call **855-771-2966**

Visit russellinvestments.com/OCIO



Important information

Nothing contained in this material is intended to constitute legal, tax, securities, or investment advice, nor an opinion regarding the appropriateness of any investment, nor a solicitation of any type. The general information contained in this publication should not be acted upon without obtaining specific legal, tax, and investment advice from a licensed professional.

Award information (in order of appearance): **1.** For the 12th year in a row, Russell Investments was globally ranked among leading institutional OCIO managers based on outsourced assets under management from 55 firms (as of March 31, 2022) in the July 2022 *Pensions & Investments*' annual survey of OCIO managers. **2.** Russell Investments was named the "OCIO of the Year" winner at the 2020 Pension Bridge Institutional Asset Management Awards for providing exceptional OCIO services to our valued clients. Scoring criteria for this category (past year OCIO business activities ending June 30, 2020) included our successful implementation of our [sustainable investment strategy](#) for OCIO clients and our position as one of the world's largest OCIO providers. Agility, Goldman Sachs Asset Management, Meketa Investment Group and SEI were other finalists competing for this award. Short-listed recipients were invited to the publication's awards ceremony, in which we purchased an event table and received licensing usage rights of the award logo/badge. **3.** Russell Investments was ranked as a top global manager of 401(k), 403(b) or other DC outsourced assets, out of 45 firms, in *CIO Magazine*'s "2022 Outsourced-Chief Investments Officer (OCIO) Survey," based on the AUM from its fully discretionary clients (as of December 31, 2021). **4.** For the 14th year in a row, Russell Investments was globally ranked as one of the top 10 largest consultants. The ranking is based on worldwide institutional assets under advisement (AUA) from 66 firms (as of June 30, 2022) in the 2022 *Pensions & Investments* "Special Report: Investment Consultants".

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All data as of 9/30/2022 unless otherwise noted. First used: August 2018. Revised: February 2023.

AI-29196-11-23