

RUSSELL INVESTMENTS AT-A-GLANCE

# Investment outsourcing for Hospitals and healthcare systems

The market roller coaster of the past several years has brought market volatility and risk management to the forefront of our minds as investors. Russell Investments has helped hospitals and healthcare systems navigate challenges and meet goals since 1983. We work with each of our clients to fully understand their asset pools and unique investment needs.

## Simplify and enhance your investment program

As is so often the case when managing complexity, delegation and oversight are key. Hiring a co-fiduciary to manage many of the details of your investment program can provide healthcare CFOs the breathing room needed to refocus their attention on the issues that matter most.

We can also serve as a means of enhancing your organization's investment capabilities and sophistication. In our experience it's possible to not only delegate many current duties to a trusted provider, but to dramatically enhance the overall investment program at the same time.

## Adapting to a changing environment

There's a daunting amount to keep on top of just in the regulatory and accounting changes affecting the management of your pension, foundation, and long term pools in the last five years. We employ hundreds of investment professionals to keep abreast of these changes and incorporate them in state-of-the-art investment programs. We can act as an extension of your staff—not only advising, but implementing your investment program and helping you fulfill your fiduciary duties. We start by listening to understand the goals most important to your organization, and then customize a program to meet your needs.

## Proven leaders



Top rated in client satisfaction (2016-2017)



Voted tops in manager due diligence (2008-2014)



A leading Institutional investment outsourcer (2011-2017)



INVESTMENT OUTSOURCING

Innovation Winner – Investment Outsourcing



A leading consultant in worldwide assets (2010-2017)

## By the numbers

1936

Russell Investments founded

\$296.6 billion<sup>†</sup>

Global assets under management

\$2.4 trillion<sup>‡</sup>

Global assets under advisement

\$723.3 billion

Transitions through implementation services business

1,700+

Clients worldwide

All data as of 12/31/2017, unless otherwise noted. <sup>†</sup> AUM as of 12/31/2017. <sup>‡</sup> AUA as of 6/30/2017.

## What can we take off your plate?

Every hospital and healthcare system is different, and Russell Investments creates solutions for each that are tailored to fit the needs of the investment program, portfolio by portfolio. The outsourcing solutions we deliver typically include:

### STRATEGIC ADVICE

- Governance
- Fiduciary structure
- Objective setting
- Asset/Liability studies
- Model portfolios
- New investment strategies

### IMPLEMENTATION

- Investment management
- Manager research, selection, monitoring & contracting
- Portfolio & manager rebalancing
- Cash securitization
- Risk management
- Manager terminations and new hires (Transition management)

### ADMINISTRATION

- Trust & custody for Russell Investments-managed assets
- Fund reporting
- ERISA reporting
- Online statements
- Audit assistance
- Benefit statements

### OTHER VALUE-ADDED SERVICES

- "My access" - secured client site on [RussellInvestments.com](http://RussellInvestments.com)
- Review meetings
- Capital markets research
- Pension research
- Educational events

## Keeping the end goal in mind

When it comes to hospitals and healthcare systems, we know that there's more than money at stake. Patients, employees, and communities depend on the success of your efforts. That's why we're here to help, and why we work to deliver real, lasting value for our clients.

For more information please call 866-739-7979 or visit [Russellinvestments.com/healthcare](http://Russellinvestments.com/healthcare)

### AWARD INFORMATION (in order of appearance)

- <sup>1</sup> For the second year in a row, Russell Investments was top rated for "client satisfaction" out of 37 rated firms in *CIO Magazine's* "2017 Outsourced-Chief Investment Officer (OCIO) Vendor Ratings" survey. Our surveyed OCIO clients rated themselves as "very satisfied" with our Overall Service (90%), Investment Results (73%), Value for Fees (73%), and Ancillary Services (73%).
- <sup>2</sup> In 2014, for a sixth year in a row, Russell Investments was voted among the top two for having the best manager due diligence practices by respondents in a 2014 *FundFire* survey of nearly 100 consultant relations professionals. (*FundFire* discontinued their survey in 2015.)
- <sup>3</sup> For the seventh year in a row, Russell Investments was globally ranked among the leading institutional outsourced managers based upon outsourced assets out of 67 firms in the Pensions & Investments' survey issued in June 2017.
- <sup>4</sup> Russell Investments was named as the winner of *CIO Magazine's* 2017 Industry Innovation Award for Investment Outsourcing. *CIO* cited Russell Investments' top client satisfaction rankings in the magazine's 2016 and 2017 OCIO Vendor Ratings surveys, as well as the firm's position as one of the world's largest OCIO providers. This is Russell Investments' fifth time as a *CIO* Industry Innovation Award winner since the awards were created in 2010. [The *CIO* Industry Innovation Awards have various categories; recipients may differ each year and not be repeated. Previous award wins: FX (2011); Tactical Risk Management (2012); Investment Outsourcing (2013); Transition Management (2014).]
- <sup>5</sup> For the eighth year in a row, Russell Investments was ranked as one of the top-five largest consultants. Ranking is based on worldwide institutional assets under advisement (AUA) by the 2017 *Pensions & Investments* Consultant Directory.

### IMPORTANT INFORMATION

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All data current as of 12/31/2017 unless otherwise noted.

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