

Fiduciary Solutions: Investment Outsourcing

By the numbers

1936

Russell Investments founded

\$258.1 billion†

Global assets under management

\$2.4 trillion*

Global assets under advisement

\$642.2 billion

Transitions through implementation services business

1,700+

Clients worldwide

20+

Offices worldwide, with principal offices in: Seattle (headquarters), New York, Chicago, San Diego, London, Paris, Amsterdam, Sydney, Tokyo, Shanghai and Toronto

Managing an institutional investment program is certainly not getting any easier. More and more CFOs and investment committees are looking for support—assistance that goes beyond advice and manager research to help shoulder the burden of fiduciary responsibilities. At Russell Investments, we think this is more than a good idea. We believe that an objective review and investigation of management options constitutes a fiduciary imperative—particularly given today’s investment environment and the recent rate of regulatory and accounting rule changes.

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 CFOs and investment committees 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 oversight of your investment program at the same time.

A TRUSTED PROVIDER AND PROVEN LEADER



Top rated in Client Satisfaction — Russell Investments was top rated for “Client Satisfaction” out of 39 rated firms in *CIO magazine’s* “2016 Outsourced-Chief Investment Officer (OCIO) Vendor Ratings” survey in “Overall Service” (70%) and “Ancillary Services” (78%) categories.



Voted tops in manager due diligence — 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.)



A leading institutional investment outsourcer — For the sixth year in a row, Russell Investments was globally ranked among the leading institutional outsourced managers based upon outsourced assets out of 77 firms in the Pensions & Investments’ survey issued in June 2016.



Innovation Winner – Investment Outsourcing — In 2013, for the third year in a row, Russell Investments was named as an *aiCIO* Industry Innovation Award winner. The 2013 award named us the winner in the Investment Outsourcing category for asset managers and servicers. Notably, we were recognized for its in-house implementation capabilities and robust investment and sales teams.¹



A leading consultant in worldwide assets — For the seventh year in a row, Russell Investments was ranked as one of the top-five largest consultants. Ranking is based on worldwide assets under advisement (AUA) by the 2016 *Pensions & Investments* Consultant Directory.

All data as of 12/31/2016, unless otherwise noted.

† AUM as of 12/31/2016.

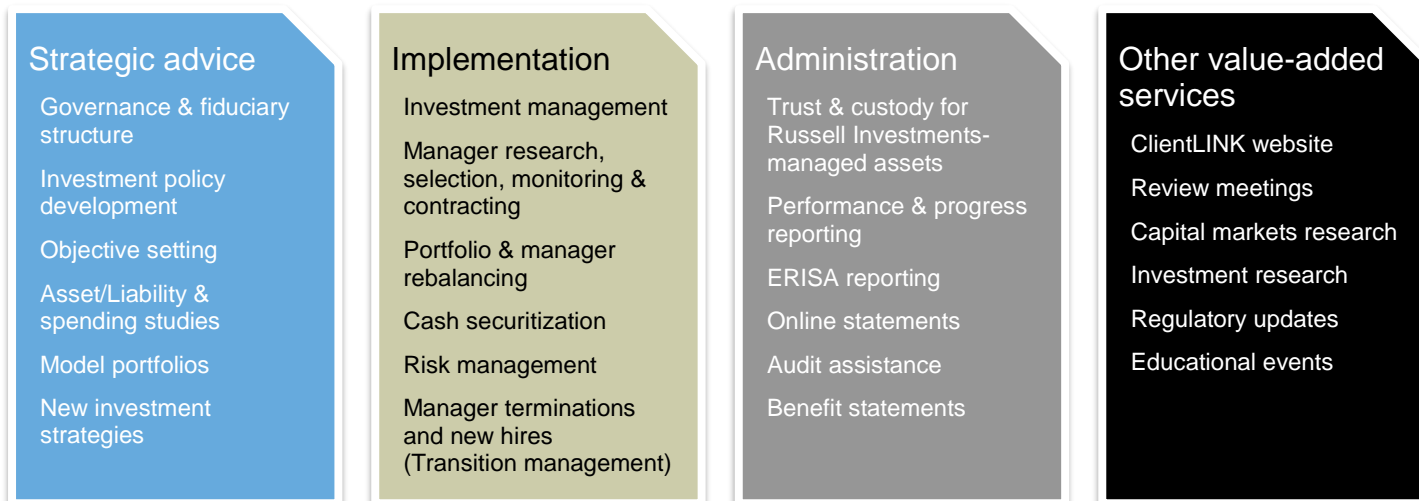
* AUA as of 06/30/2016.

Adapting to a changing environment

There's a daunting amount to keep on top of in managing an institutional investment portfolio. We employ hundreds of investment professionals to help our clients keep abreast of industry changes and innovations. 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 work to understand the goals most important to your organization and then customize a program to meet your needs.

What can we take off your plate?

Every organization is different, and Russell Investments creates solutions for each that are tailored to fit the needs of the investment program, portfolio by portfolio. The fiduciary solutions we deliver most often include:



Open architecture

Active. Passive. ETFs. Single manager. Multi-manager. Alternatives. Your choice of provider should not constrain the investment program you want to build. Beware of captive programs that limit your choices.

Keeping the end goal in mind

We know that a lot rides on the success of your investment program—that there's more than money at stake. Your business, employees, shareholders, members, patients, communities, and more may 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.

We'd love to discuss what Russell Investments can do for you. Please call (866) 687-1216

Or visit RussellInvestments.com/institutional

¹ The aiC/O Industry Innovation Awards have various categories; recipients may differ each year and not be repeated.

Important Information

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Please remember that all investments carry some level of risk, including the potential loss of principal invested. They do not typically grow at an even rate of return and may experience negative growth. As with any type of portfolio structuring, attempting to reduce risk and increase return could, at certain times, unintentionally reduce returns.

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