

# In This Series . . .



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Get to Know OCIO



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OCIO vs. Other Outsourcing Options



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Finding the Right OCIO

# FINDING THE RIGHT OCIO

*Not all OCIOs are the same! Whether an organization hires a consultant or conducts its own search, finding the right OCIO requires preparation and effective due diligence.*



# IS OCIO RIGHT FOR YOU?

## *Motivations and Limitations*

### **MOTIVATIONS**

- Improved Performance
- Time Limitations
- Specialized Needs
- Access to Talent
- Access to Alternatives



### **LIMITATIONS**

- Governance/Discretion
- Internal Resistance
- Size of Organization

We hope you enjoyed these sample pages of **Deep Dive Module 4 - Finding the Right OCIO**. If you are interested in learning more, please email us at [ocio@strategicgroup.com](mailto:ocio@strategicgroup.com). We would be happy to schedule a time to present one or more of the full modules to your Investment Committee or Board.

**T**hank you for your interest in Outsourced Chief Investment Officer services. For more in-depth information and analysis, we invite you to visit **ocio.org**.

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