

# Independent Investment Consultants

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Founded in 1973, LCG is a full-service, national consulting firm headquartered in Atlanta, Georgia. Our sole focus is investment consulting. We are an independent 100% employee-owned firm. We believe this ensures LCG's and our clients' interests are aligned long-term. While our organization may be unique in today's environment, we believe this is the only way a true partnership can be formed with clients. Our goal is to provide a select number of clients with highly customized advice and serve as an "extension of staff."

## Independent Advice

- > Our recommendations are based solely on our clients' best interests
- > 100% of our revenues are paid directly by clients
- > We do not accept any compensation from investment managers
- > We do not accept any compensation from broker/dealers
- > We do not engage in pay-to-play relationships

## \$97 Billion in AUA/AUM (as of 6/30/18)

Client types served include defined benefit plans, defined contribution plans, endowments, foundations, family offices/private wealth, healthcare organizations, and Nuclear Decommissioning Trusts.

## Services

- > Investment policy development
- > Manager guidelines
- > Asset allocation modeling
- > Spending policy modeling, development
- > Asset/liability studies
- > Alternative manager search and selection
- > Traditional manager search and selection
- > ESG/SRI/II/MRI services
- > Fee analysis and negotiation
- > Performance measurement
- > Risk management
- > Defined contribution services
- > NDT services
- > Vendor search, benchmarking
- > Client education
- > Implemented consulting (OCIO)



This material is for informational purposes only and should not be construed as investment advice or an offer or solicitation to buy or sell securities. The information provided herein is based on matters as they exist as of the date of preparation, or otherwise indicated.

## **Greenwich Disclosures**

\*The Greenwich Quality Leaders Awards are conducted by Greenwich Associates, a third-party research firm that has no affiliation with LCG, and are based on quality ratings provided by clients of investment consultants. Between July and October 2017, Greenwich Associates conducted interviews with 1,059 senior professionals at 884 of the largest tax-exempt funds, 21 of whom retain LCG, in the United States. These organizations included corporate and union funds, public funds, endowments and foundations, insurance general accounts, and healthcare organizations, with either pension or investment pool assets greater than \$150 million. Consultants like LCG receive the survey results in exchange for providing Greenwich Associates with evaluations of investment managers. LCG did not pay Greenwich Associates any compensation for inclusion in this study.

Study participants were asked to provide quantitative and qualitative evaluations of their investment consulting providers. Based on those responses, Greenwich Associates calculates a score on the Greenwich Quality Index<sup>SM</sup> for each consultant named. Consultants with scores that top those awarded to competitors by a statistically significant margin are named Greenwich Quality Leaders. Three consulting firms, including LCG Associates, Inc., were recognized as Greenwich Quality Leaders for mid-sized firms in the U.S. The rankings presented are not necessarily representative of any single client's experience, but rather represent the collective views of LCG's sampled clients. Rankings do not represent an endorsement of LCG. Past performance is no guarantee of future results. For more information on Greenwich Associates and the study, please visit: <https://www.greenwich.com/>.