

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. In serving as a fiduciary, 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 that 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 your staff."



Independent Advice

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



Client Base & Representative Client List¹

- 106 clients nationally with \$117 billion in AUA/AUM
- 55% E&Fs/other non-profits 45% corporations/for-profits
- Client types served include pension plans, defined contribution plans, E&Fs, family offices/private wealth, healthcare organizations, and NDTs.



Our Services

- Investment policy development
- Asset allocation modeling
- Traditional asset class research
- Alternative investment research
- ESG/SRI/II/MRI services
- Performance measurement
- Client education and fiduciary training
- OCIO services

Why Choose LCG



Client Focused

- Select number of clients by design
- Customized portfolios
- High level of service/extension of staff



Experienced and Stable Team

- Senior Analyst average experience: 29 years²
- Virtually no Senior Consultant turnover
- 51 years of serving clients



Independence

- Conflict-free, unbiased advice
- Broadly diversified ownership
- In business for 51 years



Firm of Analysts

- Senior-led research
- No disconnect between research, clients
- Best thinking of the Firm

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¹ Clients as of 07/01/24. Assets are provided as of most recent data available between 12/31/23 and 3/31/24.

² Senior Analysts are defined as people in the following roles: CEO; President; Senior Vice Presidents/Senior Consultants; Research Directors (Marketable & Alternative); CITO; and VP, Client Performance & Reporting.

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