

Outsourced CIO (OCIO)

We also call it “Investment Solutions”

We demystify some of the misconceptions around outsourced CIO (OCIO) and investment solutions we have heard from investors over the years. Many of these investors are now our clients.

With volatility returning to financial markets and complex investment portfolios demanding increasing amounts of time, resources and expertise from in-house teams, why not see how the approach might work for you?



Myth 1

“Outsourced CIO, delegated solutions, implemented consulting, fiduciary management – they’re all different.”

Fact 1

There are many names for this approach, but they all center on the same thing: supporting a range of unique institutional investors to meet their goals more efficiently.

Each provider will have their own approach, but at Mercer we let you decide how you want to work with us. Call it what you like, we call it “Investment Solutions” — and make it work for you.

Myth 2

“Investment outsourcing would make us give up control of our portfolio.”

Fact 2

We want to put you back in control and feel confident that your investments are working toward your goal.

We take on the tasks that you don’t have the time, resources or expertise to complete, enabling you to focus on overall strategy and the challenges facing your organization.

You choose how we support your specific needs — from designing sustainable investment policies to assigning us day-to-day portfolio management tasks that aim to nimbly shield your assets from risks and capture emerging opportunities.



Myth 3

“Investment Solutions would cost us more than our current arrangement.”

Fact 3

OCIO can potentially reduce overall costs for any type of institutional investor.

Mercer’s global presence sometimes helps us negotiate on fund manager and other provider fees, passing savings directly to our clients.

Often, we can help pursue access to highly-rated managers across a range of traditional and private market strategies.

Mercer cannot guarantee access to opportunities. Access is at the discretion of the manager.



Myth 4

“My portfolio is too/not sufficiently complex to need investment outsourcing.”

Fact 4

OCIO can help a wide range of investors take control of their portfolios and refocus on their objectives.

Every investor is different, and they each have their own goals, objectives and challenges. We help organizations of all sizes and complexities feel confident that their tailored investment strategy is being implemented, managed and monitored by specialists who are aligned with their interests.

Myth 5

“An OCIO platform is a one-size-fits-all option.”



Fact 5

OCIO does what you need it to do. And not what you don’t.

From fully customized investment strategy design to implementation and monitoring of managers, each client works with us in the way they choose.

We are here to support investors in whichever way they need — and we can flex with you along your journey.

Investment Solutions

Let us help you invest with confidence. Explore what we can do together.

www.mercer.us/what-we-do/wealth-and-investments/outsourced-investment-management-ocio.html