



A CLOSER LOOK AT NEPC

FIRM-WIDE OVERVIEW



1986

NEPC was founded



1987

acquired first private wealth client



2018

independently owned by 38 partners

287 EMPLOYEES



109 CLIENT SERVICE

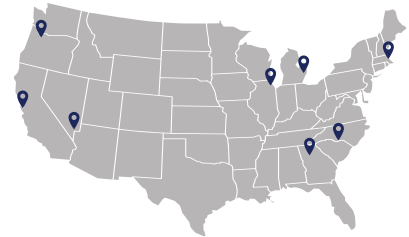
50 RESEARCH

71 PERFORMANCE REPORTING

57 OPERATIONS/SUPPORT

362 CLIENT RELATIONSHIPS CULTIVATED THROUGH:

- Discretionary and nondiscretionary investment consulting relationships
- Investment policy development
- Strategic and tactical asset allocation
- Investment manager due diligence and monitoring
- Performance reporting
- Impact Investing
- Family education
- Strategies for concentrated positions
- Custodial searches
- Specialized projects



BOSTON | ATLANTA | CHARLOTTE | CHICAGO | DETROIT | LAS VEGAS | PORTLAND | SAN FRANCISCO

NEPC'S PRIVATE WEALTH PRACTICE



\$8.5
BILLION

in assets advised by

14 DEDICATED INVESTMENT PROFESSIONALS

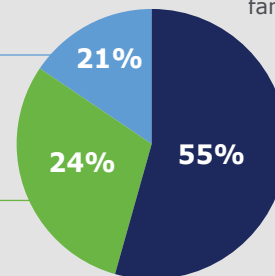


With an average of **23 YEARS** of experience.

38 CLIENTS

We advise family foundation assets only

We advise taxable family assets only



We advise both family taxable assets & family foundation assets

Average client size \$242 million

Median client size \$151 million