How the OCIO Relationship Works

Fiduciary (clients)

Clients and fiduciaries most commonly using an OCIO are:

- Pensions
- Non-Profit Organizations
- Family Offices & UHNW Clients
- Corporations

Advisor / Consultant

- **Based locally** to provide ongoing support and client service
- **Supported globally** by dedicated portfolio managers and investment professionals
- **Delivers the firm's best thinking** and a full range of innovative strategies and services by partnering with OCIO

Outsourced Chief Investment Office (OCIO)

- **Established, holistic process** grounded in risk management and an extensive open-architecture platform
- **Experienced team** with dedicated resources for each aspect of client service
- **Successful track record** with 20+ year historical client performance track record[1]

The Investment Process

We utilize an institutional, multi-factor approach to building tailored portfolios.

1 CLIENT DISCOVERY

2 ASSET ALLOCATION

3 PORTFOLIO CONSTRUCTION

4 MONITORING AND REVIEW

All with a RISK MANAGEMENT APPROACH

1. Morgan Stanley Wealth Management Outsourced Chief Investment Office (OCIO). Past performance is not a guarantee of future results.