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 openarchitecture platform
- Experienced team with dedicated resources for each aspect of client service
- Successful track record with 20+ year historical client performance track record¹

The Investment Process

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

1 S

DISCOVERY

2

ALLOCATION

ASSET

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.

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