

2018 U.S. Outsourced Chief Investment Officer (OCIO) Providers



RESEARCH OVERVIEW

Industry professionals can participate in Cerulli research through either topical research interviews or confidential surveys. In return, participants receive research findings or benchmarking reports. All information is aggregated to protect the anonymity of specific firms and respondents. Data collected is used across all Cerulli products.

TARGET AUDIENCE

OCIO Providers: Dedicated OCIOs, Asset Managers, and Investment Consultants

LAUNCH

2Q 2018

SURVEY OVERVIEW

This survey examines the Outsourced Chief Investment Officer landscape, including demand and needs across client segment, service delivery models, the range of service offerings, and level of customization offered. This survey also examines the search and selection process, fees, performance reporting methods, and asset allocation trends.

This Initiative Explores these Key Industry Trends

- How is the OCIO business evolving?
- What are the forces of growth?
- Which client segments will drive future OCIO growth?
- Which specialty services are provided to OCIO clients?

HOW TO PARTICIPATE

1. Register

Contact us or click the "Register Now" button below

[REGISTER NOW](#)

2. Complete

Interview participants

Research interviews will take 30–60 minutes to complete

Survey participants

Survey length varies, but typically takes 20–30 minutes to complete

3. Receive

Interview participants

Key Findings: Overview of the findings from our upcoming 2018 U.S. Outsourced Chief Investment Officer report

Survey participants

Complimentary Research: A copy of a relevant issue of The Cerulli Edge

Benchmarking Report: Custom report of this survey highlighting your firm's responses in comparison to the survey aggregate

CONTACT US

For more information about this research initiative, contact: surveys@cerulli.com

Michele Giuditta, CFA

Director

617-437-1098 x175

mgiuditta@cerulli.com

Miles Ransom

Analyst

617-437-1098 x109

mransom@cerulli.com

LEARN MORE

For more information about Cerulli research initiatives, please contact:

Cerulli Associates

+1 617 437-0084



CERULLI
ASSOCIATES

Research | Analytics | Consulting

699 Boylston Street
Boston, MA 02116

info@cerulli.com

Cerulli Research Initiatives