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## Customized Solutions.

## Award-Winning Results.

Agility serves as the Outsourced CIO for a select group of premier endowments, foundations, family offices, and other long-term investors. As it has for over a decade, Agility develops and executes a customized investment solution to help each client meet its unique goals.

Find out how Agility can help your organization meet its goals.

[Explore Agility](#)

## Approach

Agility has provided Outsourced CIO services since its inception in 2007. Our business model is built around working in close partnership with only a limited number of clients. We take the boutique nature of our business very seriously – we want each client to feel as if it has its own in-house investment team.

We view each client as a true partner. Clients benefit from Agility’s extensive resources, including dedicated investment, accounting, operations, and legal personnel. We also understand that being a good partner goes beyond simply providing investment results. We work closely with clients on a variety of other projects, from help with audit needs to donor relations.

[Learn More](#)

## Solutions

We understand that no two clients are alike, so we built our business around customization. We work closely with each client to establish its long-term investment goals, and we then design a program that we believe best meets those needs. Customization extends beyond investing, as well. We work with each client to meet specific reporting, infrastructure, and communication needs.

Regardless of your specific needs, Agility can craft a solution. Agility offers two primary investment approaches – a commingled approach, using our proprietary Building Block Portfolios, and separate accounts for more unique situations. Both options provide for a high degree of customization and optionality.

[Learn More](#)

## Outsourcing

For many institutions, in-house investment management is under-resourced. The challenging landscape of the global economy and financial markets requires experienced professionals with a singular focus on investing.

Investing is not a part-time job. Maintaining fiduciary responsibility has become increasingly difficult, leading to what some have termed “fiduciary fatigue.” Agility’s clients can feel comfortable that their assets are under careful, disciplined stewardship – every day of the week.

Learn how Agility applies its award-winning capabilities as an Outsourced CIO to help its clients navigate the complex investing environment.

[Learn More](#)

## News

Press Release

[\*\*Amita Schultes Joins Perella Weinberg Partners Agility as Managing Director\*\*](#)

10.26.2017

Press Release

[\*\*Perella Weinberg Partners Agility Named “Outsourced CIO of the Year” By Institutional Investor\*\*](#)

6.22.2017

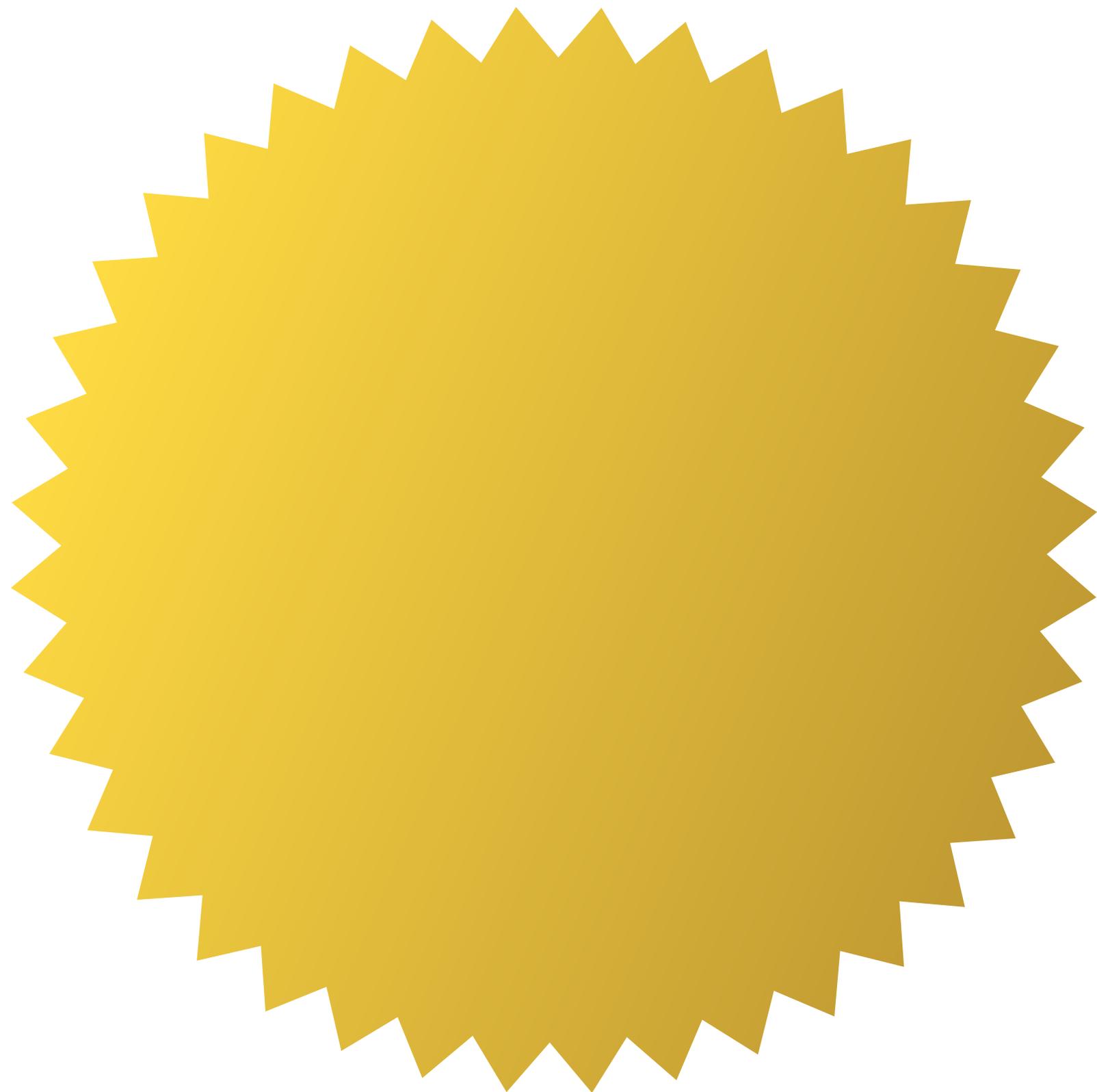
Press Release

[\*\*Perella Weinberg Partners Agility Forms Strategic Advisory Board\*\*](#)

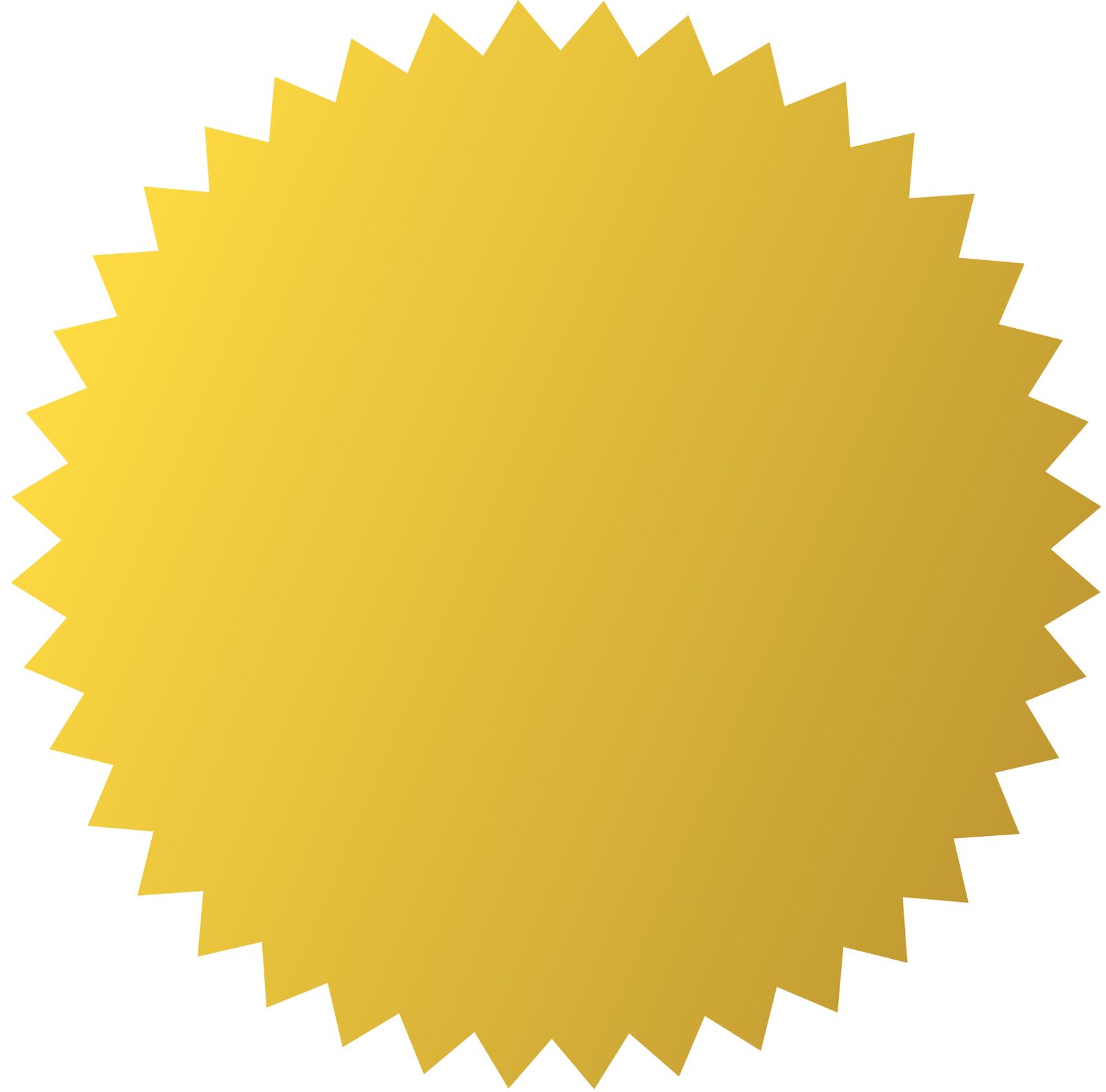
6.19.2017

## Agility Accolades

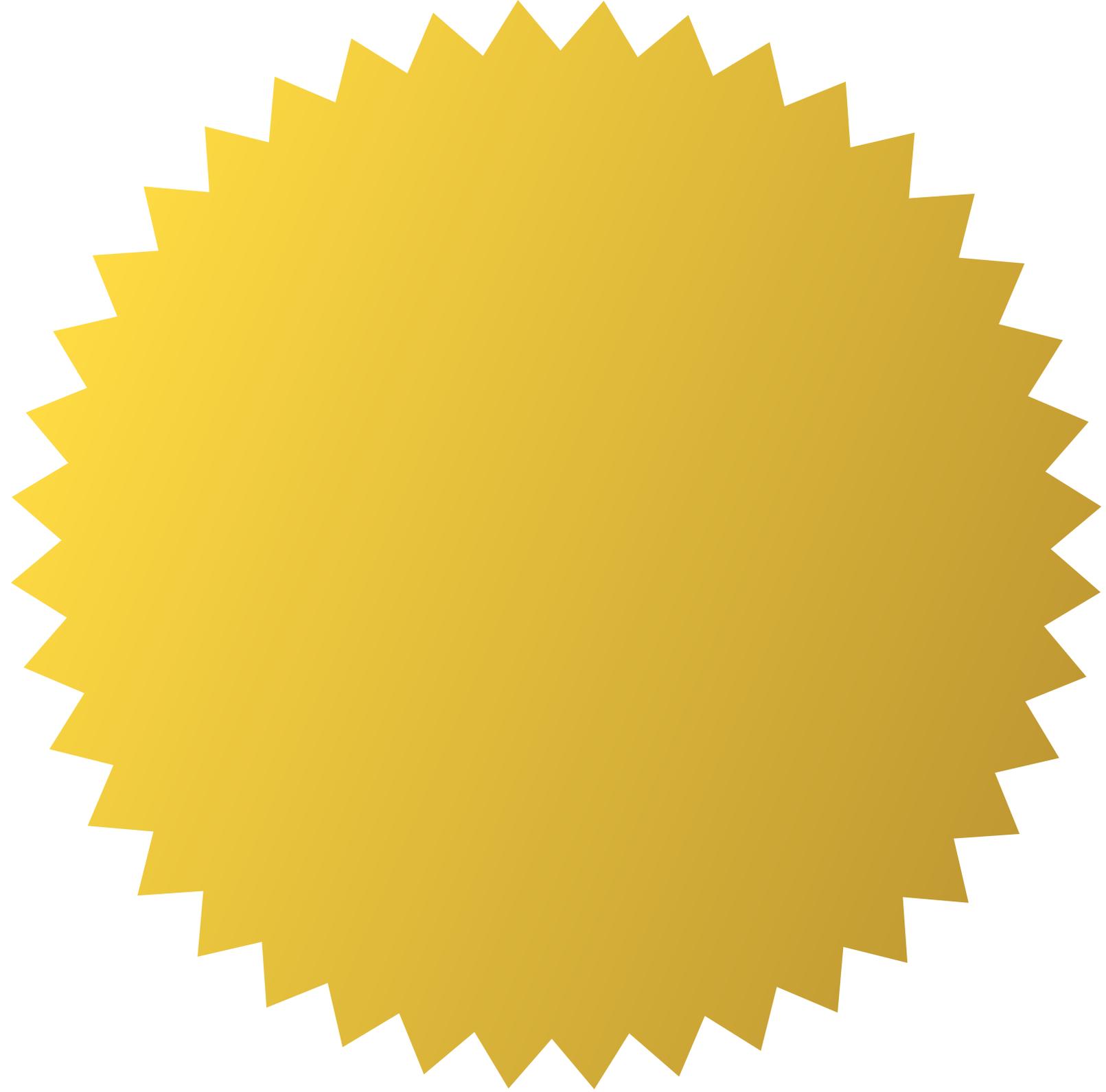
Led by Chief Investment Officer Chris Bittman, Agility was awarded "Outsourced Chief Investment Officer of the Year" based on "innovative investment strategies, impressive overall performance and client service, and effective risk management" for four years - 2013, 2014, 2015 and 2017.



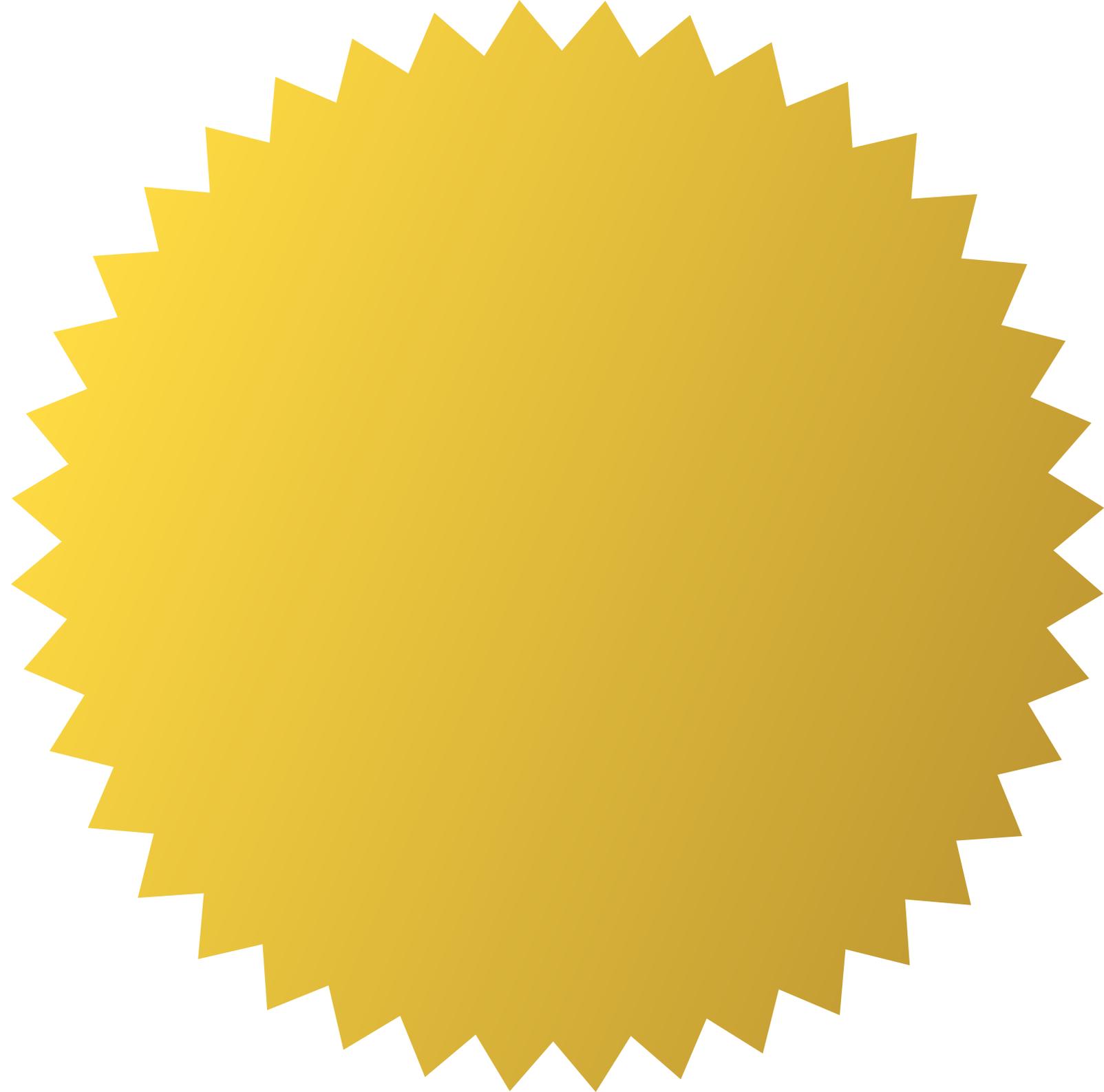
Institutional Investor  
Hedge Fund Industry Awards  
Outsourced CIO of the Year 2017



Institutional Investor  
Hedge Fund Industry Awards  
Outsourced CIO of the Year 2015



Institutional Investor  
Hedge Fund Industry Awards  
Outsourced CIO of the Year 2014



Foundation & Endowment Intelligence  
Hedge Fund Industry Awards  
Outsourced CIO of the Year 2013

The Outsourced CIO of the Year Award (the “Award”) is not indicative of Perella Weinberg Partners Agility’s (“Agility”) future performance nor is it representative of any one client’s experience with Agility. Foundation & Endowment Intelligence is an Institutional Investor publication covering non-profit investment opportunities and the non-profit sector. Following a public call for nominations, the editorial staff of Institutional Investor magazine selects award nominees based on how strongly candidates, both those put forward via the call for nominations, and those independently identified by the editorial staff, meet the criteria for their respective categories. Once the nominees are publicly announced, the magazine group then conducts a wide survey of U.S. institutional investors and invites them to vote for the manager nominees. Hedge fund managers are also invited to vote for the investor nominees. Institutional Investor's editorial staff analyzes the results of the voting to determine the winners, who are announced at the annual awards dinner and ceremony. The Outsourced CIO of the Year Award is not indicative of Perella Weinberg Partners Agility’s future performance, nor is it representative of any

one client's experience with Agility. Foundation & Endowment Intelligence, published by Institutional Investor, covers non-profit investment opportunities and the non-profit sector. Perella Weinberg Partners has no affiliation with Institutional Investor, Foundation & Endowment Intelligence nor any persons who select the award. Perella Weinberg Partners did not pay any fees to be considered for this award. For additional information on the Outsourced CIO of the Year Award and the selection criteria and methodology, please visit: <http://www.hedgefundindustryawards.com/methodology.php>.

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