

White Oaks is a fee-only investment management firm that serves endowments, funds, and non-profits, as well as high net worth families and family offices. We are a boutique firm that offers services surrounding alternative investments, risk models, gifting allocations, and more. You and your team will work directly with CFAs, CFPs®, CPAs and investment analysts.

Discover the **Outsourced Chief Investment Officer capabilities brochure** to learn how White Oaks serves institutions, or view our **services**.

Spun off of **White Oaks Wealth Advisors**, White Oaks Investment Management was built to serve institutions, foundations, endowments, and family offices who don't have the necessary staff or investment team.

White Oaks Investment Management has successfully navigated growth, changing markets, and turnover within the financial industry. As a forward-thinking firm, we plan to power our investment success in innovative ways for years to come.



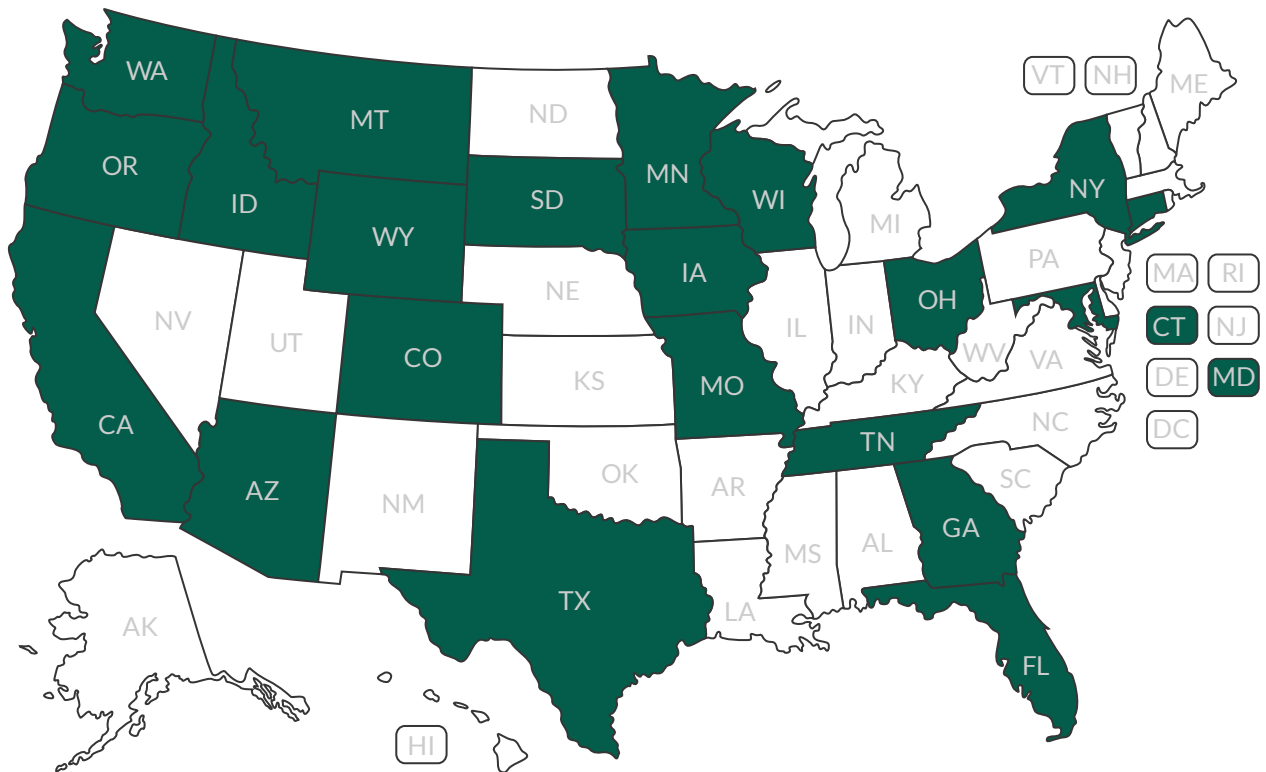
Institutions

Individuals

Let's have a conversation to see if we are a fit for you.

Contact us

White Oaks serves clients globally and nationally. Today the firm provides to clients in 60+ U.S. cities.





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