

Employee-Owned. Client-Focused.

Collaborating with institutional investors to make the most informed investment decisions for the beneficiaries they serve.

Meet our people



Our independence is your advantage.

Callan works with institutional investor clients to build custom, lasting investment solutions by using a client-focused consulting model. As one of the largest independently owned investment consulting firms in the U.S., Callan is only focused on business objectives that benefit our clients. It also means our clients get access to a more stable consulting team supported by tools, data, and resources that could only be built by an organization with an exclusive focus on their needs.

Learn more about our people, business, and approach. See how we make an impact in the **community**.



Study: How Asset Managers Run Their Own 401(k) Plans

Our latest study explores what investment managers, the stewards tasked with managing the investments of 401(k) plans for others, offer their own employees.

Featured Research

Animated Video: The Periodic Table Explained

Go back in history to see the evolution of the Callan Periodic Table of Investment Returns and learn how it can help investors of all kinds.

Featured Research

2019-2028 Capital Market Projections

Explore our data-rich *Capital Market Projections*, detailing expected return, standard deviation, and correlations for major asset classes. These projections represent our best thinking for a longer-term outlook and are critical for strategic planning.



Video

Part I: What Keeps Him Coming to Work After 30 Years

In his interview with Millie, CEO and Chief Research Officer Greg Allen discusses the unique Callan culture, how the firm has evolved, and what continues to motivate him.



Video

Part II: On His Role as Chief Research Officer

Greg talks about his focus on enhancing the Callan Institute's role as a research and education platform and how that makes the firm better.

Visit the newly created Callan Newsroom for the latest updates, press releases, articles, and more.



Callan @CallanLLC

3 hours ago

RT @DCIIA_News: Member webinar: What Plan Sponsors Should Know About Sustainable Investing in DC Plans, Jun 21, 1:00 pm ET Many thanks to ou...

Latest Callan News

Callan Hires Sara Hakim as SVP, Consultant

"If associates have a mission and vision of doing something good for society over just financial incentives, they are more likely to make good moral and ethical decisions."

Ron Peyton

Executive Chairman



Contact Callan

I need to **contact a consultant**

I'd like to add our data to the **Manager Questionnaire**

I need to register for an **upcoming Callan event**

I'm a member of the **media**

I'm a **diverse and emerging manager**

I'd like to learn more about the **Callan Institute**

Frequently Asked Questions

What does **Callan** do?

Who are **Callan's executive leaders**?

Where are your **offices located**?

How can I access Callan **research**?

Where can I learn about **career opportunities**?

How does Callan make a difference in the **community**?

Would you like to talk to us? Call our San Francisco headquarters, 415.974.5060