

Independence and objectivity underpin the fiduciary investment consulting services Alan Biller and Associates provides US institutional investors.

An employee-owned firm focused exclusively on investment consulting since 1982, today we are one of the largest discretionary consultants in the US. For each of our clients, our seasoned professionals bring fiduciary responsibility, strategic risk oversight, an informed perspective, straightforward communication, and impeccable execution.

Plan sponsors hire us to advise them on decisions about increasingly complex investments. We can act in both a traditional and discretionary (Outsourced CIO, or OCIO) consulting capacity.

As a non-discretionary consultant we:

- Advise on investment and asset allocation policies
- Conduct manager searches
- Negotiate manager contracts and fees
- Draft account investment guidelines
- Monitor managers over time
- Provide comprehensive performance reporting
- Provide client education

As a discretionary OCIO, we may also:

- Determine investment and asset allocation policies
- Rebalance portfolios
- Select and dismiss managers
- Manage the portfolio according to its investment policies

Some commonly asked questions:

Q. How are you compensated?

A. We receive revenue only from our clients. There are no affiliated companies, subsidiaries, joint ventures or sponsored investment

products. We have no arrangements with brokerage or investment management firms.

Q. Is the firm registered with the SEC?

A. Yes. Please see our firm's current [Form ADV](#).

Q. What is the firm's mission?

A. Our mission is to help clients meet their investment objectives through honest, independent advice and the operational support needed to manage complex investments.

Q. What are the firm's competitive strengths?

A. Our targeted focus, talented staff, analytical acumen, and objective independence. We are adept at helping clients clarify their decision-making by applying our expertise to novel and difficult problems.

Q. Does the firm accept fiduciary responsibility?

A. Yes. We are a fiduciary for all of our retainer clients.

For more information, call us at (650) 328-7283