



Global Manager Research

CONTACT SHEET

Callan has been helping our clients select investment managers for more than three decades. Our manager search process goes beyond the cursory look at past performance by incorporating both quantitative and qualitative evaluations of an investment management organization.

Callan conducts approximately 150 to 200 searches per year across all asset classes. Over the last five years, we have conducted over 900 searches, representing more than \$160 billion in assets. Each search is tailored to meet our client's investment objectives and undergoes a disciplined process—a blend of quantitative and qualitative evaluation and quality peer oversight that is unique to Callan.

Co-Heads of Global Manager Research

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Contact asset class specialists directly depending on the investment product. Each of the specialty manager groups can be contacted at the number above.

Domestic Equity

James Danforth, CFA

Lauren Etcheverry, CFA

Mark Stahl, CFA

Domestic/International/ Global Fixed Income

Steve Center, CFA

Kelly Cliff, CFA, CAIA

Brett Cornwell, CFA

Matt Routh

Global Equity

Andy Iseri, CFA

Matt Schmelzer, CFA

Mark Stahl, CFA

International Equity

Andy Iseri, CFA

Matt Schmelzer, CFA

Hedge Funds

Jim McKee

Brian Kmetz, CIPM

Private Equity

Michael Bise

Gary Robertson

Real Assets

Sarah Angus, CAIA

Sally Haskins

Jay Nayak

Avery Robinson

Jamie Shen

Lauren Talbot

Middle Market Matrix

Mark Andersen

Amy Jones

Multi-Asset Class Portfolio

Kelly Cliff, CFA, CAIA

Target Date Funds

Kelly Cliff, CFA, CAIA

Inga Sweet

Emerging and MWDOB

Lauren Etcheverry, CFA

Alternatives Consulting

Sherwood Yuen