

The Greenwich Roundtable

The Greenwich Roundtable Defines Best Governance Practices for Investment Committees

GREENWICH, CT, March 9, 2015 --The Greenwich Roundtable has released a white paper detailing the keys to investment success for long-term investment committees. In the paper, they have identified best practices for various investment committees, including charitable organizations, pensions, insurance companies, family funds, and sovereign wealth funds. They have included actionable advice and case studies applicable for very small funds to multi-billion dollar mega funds.

“This paper breaks new ground for investment committees in the breadth and depth of our research. The principles and case studies we compiled clearly define how these groups can invest more effectively, and how they can avoid the obvious mistakes,” said Steve McMenamin, executive director of The Greenwich Roundtable.

The Greenwich Roundtable has compiled over two dozen case studies from real-life committees that illustrate ways in which committees have benefited from applying the practices the Roundtable has highlighted. They have also included some pitfalls that investment committees have faced, and how they could have been prevented as well as the behavioral traps that others fall into. Through these case studies, boards of directors and investment committees can be more aware of how to invest more strategically and effectively.

“We have conducted extensive research regarding which practices are most likely to result in a successful model of governance, because we feel that there wasn’t a comprehensive definition until now,” said Rusty Olson, former director of pension investments for Eastman Kodak Company and editor of this year’s research paper. “We hope that this paper helps readers consider how they can incorporate these practices to attain their goals.”

The paper is broken down into two sections. The first section details the best practices investment committees can implement, and the operational considerations of good governance. The second half of the paper details ways in which adhering to these practices has led to beneficial outcomes as well as the behavioral complexities that committees face in real-world scenarios.

The Greenwich Roundtable is a leading not-for-profit research and educational organization comprised largely of long-term investors who invest in sophisticated

strategies. The purpose of the Greenwich Roundtable is to discuss and provide current and cutting-edge information on non-traditional investing.

Information about obtaining copies is available at www.greenwichroundtable.org.

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