

FUND EVALUATION GROUP OVERVIEW

As an independent employee-owned, investment advisory firm, Fund Evaluation Group, LLC (FEG) has been providing investment solutions and services since its founding in 1988. As of September 30, 2022, FEG assists over 300 clients with assets under advisement (AUA) totaling \$69.6 billion. More than two-thirds of the firm's clients are non-profit organizations. FEG has more than 130 employees¹ and is headquartered in Cincinnati, OH with satellite locations in Dallas, TX, and Indianapolis, IN.

FEG currently partners with 38 community foundations across the United States, with community foundation clients representing the third largest client segment with respect to the total number of clients. As of September 30, 2022, the firm's community foundation client assets total \$4.5 billion, and range from less than \$10 million to over \$800 million.

FEG Consulting provides a complete range of institutional consulting services including investment policy development, portfolio design, asset allocation, manager search and monitoring, plan monitoring, and education for board members and their staff.

FEG Research provides asset allocation, manager selection, due diligence, portfolio construction, and alternative investment research.

The FEG representative servicing the Greater Cedar Rapids Community Foundation is Tim O'Donnell, CAIA, Senior Vice President / Consultant. Tim has 24 years of experience as an investment professional and has been with FEG since 1999.

¹ Source: FEG. As of December 31, 2022.

DISCLOSURES:

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