



February 20, 2024

ORG Portfolio Management LLC Hires David Morton, Expanding our Capabilities to Offer Full-Service Investment Consulting and OCIO Services

Cleveland, Ohio – ORG Portfolio Management LLC (“ORG”) is thrilled to announce the addition of David Morton who will lead the expansion of our capabilities to include full-service investment consulting and outsourced chief investment officer (“OCIO”) services. This strategic move comes as part of our commitment to providing comprehensive solutions to meet the evolving needs of our clients.

With over 25 years of experience in offering real estate consulting services, ORG has consistently delivered expert guidance and tailored solutions, empowering clients to make informed investment decisions and maximize their returns. The addition of full-service investment consulting and OCIO services further enhances our offerings by giving ORG the ability to be a one-stop-shop for investors seeking unparalleled support and expertise.

Our new full-service investment consulting division, led by new ORG Principal David Morton, will offer a wide range of consulting services, encompassing market analysis, performance reporting, asset class and investment manager due diligence, risk assessment, strategic planning and in-house trading capabilities. Our consultants will provide personalized advice and data-driven insights to optimize investment strategies and mitigate risks.

David has over 30 years of experience in the investment industry and brings expertise in public and private credit and equity strategies to ORG. David is a voting member of the ORG Investment Committee.

Prior to ORG, David was a Lead Portfolio Manager at Goldman Sachs Asset Management where he led the Insurance OCIO initiative and managed all aspects of his clients’ balance sheets including cash deployment, asset allocation, investment manager sourcing and reporting to the client investment committees. He was also responsible for advising his legacy clients and researching private credit investment strategies. Prior to Goldman Sachs, David was a founding partner of Rocaton Investment Advisors, a global investment consultant. During his tenure at Rocaton, David was the Chief Market Strategist and Co-Head of Alternatives Research where he was responsible for developing global market thematic views, generating investment ideas, conducting research on alternative and traditional investment managers, managing client relationships and constructing client portfolios.

ORG’s Co-Founder and Principal Edward Schwartz expressed enthusiasm about the expansion stating,

"We are delighted to broaden our service offerings with the addition of full-service investment consulting and OCIO services. This expansion reflects our dedication to addressing our clients' diverse needs while upholding the high standards of professionalism and excellence that have



defined our firm for over two decades. We believe that this move will fortify our position as a trusted partner and empower our clients to thrive in today's dynamic economic world. With the addition of David Morton and expansion into full-service investment consulting and OCIO Services, ORG can now serve as an extension of our clients' investment staff across all asset classes. The combination of extensive industry experience and our client-centric approach will pave the way for unparalleled growth and success."

ORG Principal David Morton described his excitement for the new opportunity and remarked,

"I am thrilled to be joining the ORG team and excited about the flexibility that this opportunity brings me to take care of our new and existing clients. I believe that the flexibility, nimbleness and emphasis on care and education that the ORG team provides is essential to our clients as we look to give them the best possible investment advice in today's ever-changing world."

For more information about ORG's new service offerings, please visit www.orgpm.com or contact Edward Schwartz directly at eschwartz@orgpm.com.

About ORG Portfolio Management:

ORG Portfolio Management is a global investment consulting firm dedicated to providing comprehensive solutions for pensions, foundations, insurance companies, family offices, high net worth individuals and other institutional investors. With a proven track record of success and a commitment to excellence, we empower our clients to make informed decisions and achieve their investment goals. Our team of experts is passionate about delivering top-tier service and tailored advice to meet the unique needs of each client.

For more information, please contact Edward Schwartz, Co-Founder and Principal of ORG Portfolio Management.

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A handwritten signature in black ink, appearing to read 'Edward Schwartz', with a large, sweeping flourish at the end.

Edward Schwartz
Principal and Co-Founder