LCG ASSOCIATES

***Founded in 1973, LCG is a full service, national consulting firm headquartered in Atlanta, Georgia. Our sole focus is investment consulting. We are an independent, 100% employee-owned firm. In serving as a fiduciary, we believe this ensures LCG's and our clients' interests are aligned long-term. While our organization may be unique in today's environment, we believe this is the only way that a true partnership can be formed with clients. Our goal is to provide a select number of clients with highly customized advice and serve as an "extension of your staff."**

Coalition Greenwich Awards
Best Investment Consultant
2019 2020 2021 2022 2024-25 2026

Independent Advice

- Our recommendations are based solely on our clients' best interest
- 100% of our revenues are paid directly by clients
- We do not receive any compensation from investment manager or broker/dealers
- We do not engage in pay-to-play relationships

Client Base & Representative Client List[1]

- 112 clients nationally with $117 billion in AUA/AUM
- 57% E&Fs/other non-profits 43% corporations/for-profits
- Client types served include pension plans, defined contribution plans, E&Fs, family offices/private wealth, healthcare organizations, and NDTs.

Our Services

- Investment policy development
- Asset allocation modeling
- Traditional asset class research
- Alternative investment research
- ESG/SRI/II/MRI services
- Performance measurement
- Client education and fiduciary training
- OCIO services

Why Choose LCG

Client Focused
- Select number of clients by design
- Customized portfolios
- High level of service/extension of staff

Independence
- Conflict-free, unbiased advice
- Broadly diversified ownership
- In business for 53 years

Experienced and Stable Team
- Senior Analyst average experience: 28 years[2]
- Virtually no Senior Consultant turnover
- 53 years of serving clients

Firm of Analysts
- Senior-led research
- No disconnect between research, clients
- Best thinking of the Firm

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1 Clients as of 11/01/26 and assets are as of most recent data available between 03/31/26 and 06/30/2026.
2 Senior Analysts are defined as people in the following roles: CEO; President; Senior Vice Presidents/Senior Consultants; Research Directors (Public & Private); CITO; and VP, Client Performance & Reporting.
This material is for informational purposes only and should not be construed as investment advice or an offer or solicitation to buy or sell securities. The information provided herein is based on matters as they exist as of the date of preparation, or otherwise indicated.

*The Coalition Greenwich Best Investment Consultant Awards are conducted by Crisil Coalition Greenwich, a third-party firm that has no affiliation with LCG, and are based on quality ratings provided by clients of investment consultants. Between February and September 2025, Crisil Coalition Greenwich conducted interviews with 698 individuals from 573 of the largest institutional funds, 27 of whom retain LCG, in the United States. Between February and September 2024 Crisil Coalition Greenwich conducted interviews with 699 senior professionals at 563 of the largest tax-exempt funds, 25 of whom retain LCG, in the United States. Between February and November 2022, Coalition Greenwich conducted interviews with 727 senior professionals at 590 of the largest tax-exempt funds, 31 of whom retain LCG, in the United States. Between July and October 2021, Coalition Greenwich conducted interviews with 811 senior professionals at 661 of the largest tax-exempt funds, 31 of whom retain LCG, in the United States. Between July and October 2020, Coalition Greenwich conducted interviews with 856 senior professionals at 704 of the largest tax-exempt funds, 30 of whom retain LCG, in the United States. Between July and October 2019, Greenwich Associates (now Crisil Coalition Greenwich) conducted interviews with 1,100 senior professionals at 896 of the largest tax-exempt funds, 33 of whom retain LCG, in the United States. These organizations included corporate, public, union, and endowments and foundations funds, with either pension or investment pool assets greater than $150 million. Consultants like LCG receive the study results in exchange for providing Coalition Greenwich with evaluations of investment managers. LCG did not pay Crisil Coalition Greenwich any compensation for inclusion in this study.

Study participants were asked to provide quantitative and qualitative evaluations of their investment consulting providers. Based on those responses, Crisil Coalition Greenwich calculates a score on the Greenwich Quality IndexSM for each consultant named. Consultants with scores that top those awarded to competitors are named Best Investment Consultant. Four consulting firms, including LCG Associates, Inc., were recognized as Crisil Greenwich Best investment Consultant for midsize firms in the U.S. The rankings presented are not necessarily representative of any single client's experience, but rather represent the collective views of LCG's sampled clients. Rankings do not represent an endorsement of LCG. Past performance is no guarantee of future results. For more information on Crisil Coalition Greenwich and the study, please visit: https://www.greenwich.com/.