

Stairway Partners provides comprehensive investment management solutions to institutional investors seeking an efficient and cost-effective platform for managing their assets. Our expertise in portfolio construction and risk management comes from many years of experience managing assets for large institutional clients. We emphasize the industry's best practices, and offer services ranging from investment-only mandates where we manage a portion of the client's assets based on specific need, to complete investment outsourcing where we deliver strategic planning, policy guidance, investment management and comprehensive performance reporting to help boards and trustees more effectively manage their fiduciary obligations.

Quick Facts

- Independent firm founded in May 2004 by senior investment professionals from Brinson Partners/UBS Global Asset Management
- SEC Registered Investment Advisor providing comprehensive investment services
- Globally diversified portfolios with actively managed asset allocation
- Strategies are implemented primarily with passively managed investment vehicles
- Stairway Partners, LLC has over a decade of documented investment results. Performance composite reports for all of our strategies are available upon request

Our Focus

- **Asset Allocation** - Our investment discipline is grounded in the principle that the overwhelming majority of a portfolio's risk and return is determined by its asset class mix.
- **Diversification** - We employ a multi-asset class approach to investing, constructing portfolios with optimal risk and return characteristics.
- **Customization** - Each individual portfolio is structured within the framework of a customized investment policy and an explicit performance benchmark.
- **Liquidity** - Portfolios are constructed with liquid investments, offering the ability to seamlessly adapt to changing circumstances or market conditions.
- **Efficiency** - Low costs and low turnover help our clients keep more of their portfolio's return over time.
- **Accountability** - We provide professional portfolio monitoring, with timely and meaningful performance reporting.

Investment Outsourcing

Stairway works in concert with boards, investment committees and financial staff to provide the following:

- Asset allocation modeling for specific liability structure, liquidity needs, risk constraints and return hurdles
- Strategic planning and investment policy design
- Discretionary investment advice and implementation for streamlined decision-making
- Ongoing oversight and risk management
- Portfolio-level performance reporting and attribution
- Independent economic and capital markets research
- Delegated fiduciary responsibility - ERISA Section 3(38)

