



NEPC Partner Sarah Samuels, CFA, CAIA RECEIVES ADVISOR OF THE YEAR AWARD

Michael P. Manning, CFA, CAIA, Managing Partner

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We're an employee-owned investment advisory firm, which means that we are especially invested in the success of our colleagues. That's why it gives me great pleasure to congratulate our very own Sarah Samuels, CFA, CAIA, who was recently named With Intelligence's "Advisor of the Year" for the organization's 2022 Allocator Prizes.

The entire NEPC organization is excited for Sarah on winning this prestigious award - but for anyone who has had the pleasure of working directly with her, we can't say we're surprised.

The With Intelligence Allocator Prizes honors the best talent and solutions that allocators, investment consultants, asset managers, and service providers have to offer. When sharing thoughts on this year's applications, the six-person independent judging panel called Sarah "CIO material." The organization's official announcement noted, "I think NEPC very smartly grabbed her to lead investments, and she's done some really excellent work."

NEPC is proud to see Sarah's leadership and counsel be recognized by the wider institutional investment community.

Sarah serves as NEPC's Head of Investment Manager Research, overseeing the firm's investment manager research teams across public equities, credit, hedge funds and private markets. She holds the Chartered Financial Analyst (CFA) and Chartered Alternative Investment Analyst (CAIA) designations.

Before joining NEPC as a partner in 2019, Sarah was Managing Director at Wellesley College, where she was responsible for the investment of the College's endowment. She also previously worked as the Deputy Chief Investment Officer at the Massachusetts Pension Reserves Investment Management Board (PRIM), where she chaired the internal investment committee and oversaw asset allocation, investment research, and manager selection across asset classes.

Sarah frequently puts her knowledge and experience to work for furthering financial education. She serves on the advisory board for Girls Who Invest and founded the Boston chapter of Private Equity Women Investor Network (PEWIN). She served as a Board member and Investment Committee Chair at the University of New Hampshire and holds leadership roles with the CFA Society Boston Board.

This distinction is a testament to Sarah's commitment to helping clients achieve their organizational missions. It's an award that helps show how NEPC is setting a new standard for excellence in our industry.

Sarah Samuels was named Advisor of the Year at the 2022 With Intelligence Allocator Prizes. With Intelligence is a global business information organization focused on the asset management industry. Its information and data products include HFM, Eurekahedge, PCFI, REFI, Fundmap, Fund Intelligence and PMR. Winners were selected by a panel of institutional investment leaders. NEPC did not pay a fee in connection with this award.

