



A Trusted Advisor to Taft-Hartley Plans

William Blair is dedicated to helping Taft-Hartley funds and, ultimately, plan members achieve their investment objectives. We oversee more than \$3.0 billion¹ of Taft-Hartley assets. We provide dedicated client service and portfolio management expertise across domestic, international, and alternative strategies. We have included some useful information below:

William Blair is a Chicago-based, 100% active employee-owned investment firm founded by William McCormick Blair in 1935. Our core strengths are:

Commitment to Clients

William Blair's professionals strive to meet and exceed client expectations every day. Since 1935, our commitment to clients has been embodied by our founder's credo: "When our clients succeed, the firm's success will follow."

Stability and Consistency

With long-tenured portfolio managers and research analysts, our portfolios have been managed by stable investment teams, providing for consistent application of our time-tested investment philosophies.

Trusted Experience

We understand the investment objectives of labor and management trustees, as well as members, administrators, and consultants. Our long-term performance results are driven by a passion for and dedication to intensive fundamental research. This rigorous, collaborative process leverages the intellectual capital of our investment teams, allowing us to offer a wide range of investment solutions to meet client needs and support fair labor practice and job creation. We take pride in the depth of our knowledge and acuity of our insight.

A Recognized Workplace

William Blair was named one of *Pensions & Investments'* Best Places to Work in Money Management in 2012, 2013, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, and 2023, and one of the *Chicago Tribune's* Best Places to Work in Chicago in 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, and 2023.

Firm Statistics

(as of 12/31/23)

\$67.1 billion

Total assets under management

1,959

Employees (330 in Investment Management)

229 partners

55 in Investment Management

101

Investment professionals

29

Portfolio managers

47

Dedicated Investment Management analysts

25 years

Average industry experience for portfolio managers

¹As of 12/31/23; includes separate accounts and commingled assets.