

Firm Overview

Third Quarter 2021

About RiskBridge Advisors, LLC

RiskBridge Advisors, LLC (“RiskBridge”) is an Outsourced Chief Investment Officer (OCIO) firm and SEC-registered investment advisor that is employee owned and privately held. We were formed in 2020 by senior professionals with an average of 30+ years of investment and wealth management experience. RiskBridge is focused on providing risk-aware investment portfolio solutions for institutions and individuals.

Investment Philosophy

Our investment philosophy is summed up as follows:

- We are risk allocators, solving for the amount and types of portfolio risk
- Investors are better prepared for uncertainty and complexity when holistic risk informs portfolio risk
- Risk, in all its forms, is a valuable resource to be embraced, optimized, and budgeted in our view
- Asset returns, risks, and correlations are dependent on the economic cycle regime based on our analysis
- We believe combining volatility targeting, risk budgeting, and global equity, fixed income, and diversifying asset classes can generate favorable long-term growth and income while guarding against market drawdowns

Investment Team

William Kennedy, CFA, is RiskBridge’s CEO and Chief Investment Officer and chairs our Investment Committee and brings over 30 years of investment industry experience. Before founding RiskBridge, he was Chief Investment Officer of a \$4.5 billion registered investment advisor where he was responsible for investment policy, asset allocation, manager selection, and risk management. Mr. Kennedy served at Citigroup Global Markets, Inc. as the Global Director of Research and served on Citigroup’s Management Committee. He began his investment career at the Dupont Pension Fund and held senior positions at Century Atlantic Capital, Guy Carpenter & Co., and Conoco, Inc. Mr. Kennedy holds a B.S. in economics and an MBA from Texas Christian University.

Other Investment Committee members include Molly Burba, Joshua Kaufman, Christopher Reynolds, and Clay Skurdal.

About RiskBridge MVPs

<https://vimeo.com/638389676/7370951cfe>

Contact Us

For more information on RiskBridge, please go to: www.riskbridgeadvisors.com.

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RiskBridge Advisors, LLC ("RiskBridge") is a registered investment adviser based in New Canaan, Connecticut. Such registration does not imply a certain level of skill or training. RiskBridge's current written disclosure statements discussing RiskBridge business operations, services, and fees are available at the SEC's investment adviser public information website – www.adviserinfo.sec.gov or from RiskBridge upon written request.