



Strategic Asset Alliance
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Join Us in Welcoming Lucy Rimsky to SAA as Director

January 8, 2024

All of us at SAA are excited to announce the addition of Lucy Rimsky as Director, Investment Consultant. As Director, Lucy will work with Alton, Dan, and Nathan in all aspects of SAA's client services (*i.e. asset allocation, investment policy review, manager selection, performance evaluation*) and will support client relationships as a primary or secondary consultant.

Please note: *Unless otherwise contacted directly by Alton or Dan, no changes have been made to the primary contact assigned to our Partner relationship.*

Lucy brings more than 25 years of investment experience to SAA. Prior to joining SAA, Lucy was a Senior Research Analyst with US Institutional focusing on insurance clients. She led a team responsible for all aspects of the client relationship including manager research, asset allocation, and client consulting. Lucy was also a Senior Client Analyst with Marquette Associates where she worked with institutional clients providing manager research, asset allocation, and portfolio analytics, as well as an equity research associate at A.G. Edwards (now Wells Fargo).

Lucy earned a BSBA from the University of Dayton and an MBA from Saint Louis University. Currently, she is an Investment Committee Member (volunteer position) with the Girl Scouts.

Given her understanding of the unique investment challenges that insurance companies and public institutions face, Lucy's addition to SAA reinforces our goal of improving the investment process of insurers and risk pools with help from those that have 'sat in your chair' before.

If you have any questions, please feel free to contact any one of us at SAA or Eriver Eugenio at eeugenio@saai.com.