Keeping you focused on your future

Supporting endowments and foundations to deliver their investment objectives, no matter what the future brings.

welcome to brighter
Find strength in our numbers

The growing complexity of endowments and foundations (E&F) investments requires significant experience and expert technical knowledge, supported by resources and a global reach few organisations can claim.

As your trusted advisor, we help you navigate uncertainty and capture opportunities to help you reach your investment goals.

Our specialist E&F team advises charity clients globally with total assets of $254 billion under advice and total assets under management of c. $13 billion.¹

Over the past 15 years, we have built the largest investment solutions business² by assets in the world, managing more than $305 billion for more than 1,000 clients.³

Our value relies on technical investment expertise, global resources and an in-depth understanding of the E&F market built over many years. We structure our solutions with the aim to deliver the right outcomes for our E&F clients.

Explore how we can help you keep your objectives in focus and fulfil your purpose.

$305 billion in assets under management

advising on
$15 trillion of investments

6,717 investment managers rated worldwide

1,000+ clients

¹ Source: Mercer, 31 December 2019.
Why an investment solutions platform?

From large global foundations to small family-run endowments, we help organisations all over the world improve the oversight and control they have over their portfolios, and manage their reputational and investment risk while also managing their costs.

Whether you have one single endpoint or an ongoing need for support for your investments, the governance framework delivered by our investment solutions ensures your important long-term strategic decisions are not clouded by short-term issues.

Trustees and directors can own and shape the beliefs and principles, which provide a structure for all future investment activity. Importantly, precious governance budget is not used to manage day-to-day investment operations, but instead is focused on long-term strategic decision-making.

A solution whatever your needs are

We know that every client is different, with complex needs specific to their organisation.

Our experienced strategists will support your organisation throughout the investment journey to drive better outcomes for your cause – for example, by helping you define your investment beliefs, incorporate them into an investment policy document and integrate them within each area of your investment portfolio. We support our clients across a continuum of services, including:

- Sustainability and reputation management
- Income/inflation/total return portfolios
- Diversification of asset classes (including private market solutions)

Enhanced governance:
Building a framework to support you — strategy creation, asset class and manager diversification, risk management, dynamic asset allocation, cost efficiencies, standardised reporting, dedicated teams

Improved implementation:
Efficient and timely execution of decisions, impartial research by highly rated global managers, access to specialist funds, streamlined investment processes, bespoke fund reporting, cost efficiencies, diversification

Reputational risk management:
Your ethical and responsible policy creation, highly rated managers and strategies, dedicated and experienced Responsible Investment team, enhanced oversight and best practice governance for your reputation
Your choice, your objectives, our flexibility

Our investment solutions platform is a governance framework through which endowments and foundations can invest with confidence. Our clients often choose to retain control of key aspects (such as long-term strategic decision-making) while relying on Mercer to implement the day-to-day administrative duties associated with their investments.

- Robust governance framework to better support your internal resources
- Global Responsible Investment hub and research teams
- Informed portfolio diversification at manager and asset class level
- Access to a large pool of over 36,000 strategies and 6,000 highly rated managers through our solutions
- Impartial proprietary research on all third-party providers
- Significant buying power, reducing underlying manager fees
- Prompt implementation of investment strategies
- Efficient and disciplined portfolio rebalancing
- Access across a full spectrum of asset classes, with the ability to capture nascent market opportunities
- Experienced advisors and asset allocation strategists
- Integration of responsible investments, with access to impact investing and sustainability themes

ESG hub

Trust our team to help you to stay in control of your investments.

Well-resourced, experienced and dedicated global Responsible Investment team

Strategic investment policy created with you to ensure long-term direction

Responsible policy creation, keeping your objectives and reputation aligned

Manager due diligence, monitoring, review and oversight on your behalf

Extensive research on responsible investment risks and opportunities — with over 5,500 ESG-rated strategies

Regulatory reporting service and a dedicated team to deliver your objectives
References to Mercer shall be construed to include Mercer LLC and/or its associated companies.

© 2020 Mercer LLC. All rights reserved. This contains confidential and proprietary information of Mercer and is intended for the exclusive use of the parties to whom it was provided by Mercer. Its content may not be modified, sold or otherwise provided, in whole or in part, to any other person or entity without Mercer’s prior written permission.

Mercer does not provide tax or legal advice. You should contact your tax advisor, accountant and/or attorney before making any decisions with tax or legal implications.

This does not constitute an offer to purchase or sell any securities. The findings, ratings and/or opinions expressed herein are the intellectual property of Mercer and are subject to change without notice. They are not intended to convey any guarantees as to the future performance of the investment products, asset classes or capital markets discussed.

For Mercer’s conflict of interest disclosures, contact your Mercer representative or see http://www.mercer.com/conflictsofinterest.

This does not contain investment advice relating to your particular circumstances. No investment decision should be made based on this information without first obtaining appropriate professional advice and considering your circumstances. Mercer provides recommendations based on the particular client’s circumstances, investment objectives and needs.

As such, investment results will vary and actual results may differ materially. Information contained herein may have been obtained from a range of third party sources. While the information is believed to be reliable, Mercer has not sought to verify it independently. As such, Mercer makes no representations or warranties as to the accuracy of the information presented and takes no responsibility or liability (including for indirect, consequential, or incidental damages) for any error, omission or inaccuracy in the data supplied by any third party.

Investment management and advisory services for U.S. clients are provided by Mercer Investments LLC (Mercer Investments). Mercer Investments LLC is registered to do business as “Mercer Investment Advisers LLC” in the following states: Arizona, California, Florida, Illinois, Kentucky, New Jersey, North Carolina, Oklahoma, Pennsylvania, Texas, and West Virginia; as “Mercer Investments LLC (Delaware)” in Georgia; as “Mercer Investments LLC of Delaware” in Louisiana; and “Mercer Investments LLC, a limited liability company of Delaware” in Oregon. Mercer Investments LLC is a federally registered investment adviser under the Investment Advisers Act of 1940, as amended. Registration as an investment adviser does not imply a certain level of skill or training. The oral and written communications of an adviser provide you with information about which you determine to hire or retain an adviser. Mercer Investments’ Form ADV Part 2A & 2B can be obtained by written request directed to: Compliance Department, Mercer Investments, 99 High Street, Boston, MA 02110.

Not all services mentioned are available in all jurisdictions. Please contact your Mercer representative for more information.


Investment management services for Canadian investors are provided by Mercer Global Investments Canada Limited. Investment consulting services for Canadian investors are provided by Mercer (Canada) Limited.