



## Wilshire Associates

Institutional research, consulting and investment management

<b>Founded</b>	1972
<b>Offices</b>	10 globally
<b>Employees</b>	Approximately 270 employees; 70+ contributing to manager research
<b>Assets under management</b>	Over \$1 trillion in assets under advisement and \$72 billion in assets under management as of 12/31/2019.
<b>Manager overview</b>	Wilshire is a global investment advisory company specializing in investment products, consulting services and technology solutions.
<b>Client base</b>	Approximately 500 clients including public and corporate pensions, endowments, foundations, insurance companies, sovereign wealth funds and retail investors
<b>Areas of expertise</b>	Portfolio construction, asset allocation, investment management, consulting
<b>Substantial hedge fund and alternative beta experience</b>	Launched hedge fund managed account platform in 2005 Early adopter and leader in liquid alternative space since 2008, including creating liquid alternative portfolios and a suite of liquid alternative indexes Conducts research and maintains an extensive database across a variety of alternatives strategies, including alternative beta and hedge funds

### Key professionals and experience

#### Jason Schwarz

##### Chief Operating Officer Wilshire Associates

16+ years of experience  
13+ years at Wilshire

##### Previous experience

- Investment, technology and management consulting

#### Joshua Emanuel

##### Chief Investment Officer Wilshire Funds Management

15+ years of experience  
4+ years at Wilshire

##### Previous experience

- Elements Financial Group
- Jeffrey Slocum & Associates

#### Anthony Wicklund

##### Managing Director Wilshire Funds Management

17+ years of experience  
6+ years at Wilshire

##### Previous experience

- Convergent Wealth Advisors

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