



ANGELES 2022
DIVERSITY, EQUITY,
AND INCLUSION (DEI)
ANNUAL REPORT

 Angeles

2022 has certainly been a year where reflection has taken heightened relevance. This reflection relates to the continuous evolution of the global economy and implications for markets, heightened concerns about climate change and its impact on communities worldwide, and our evolving industry and workplace preferences.

As these transformations occur, our primary reflection is that it is more important than ever to stay focused on our culture and foster an organizational dynamic that allows our team to perform at its best for the benefit of clients and each other.

Optimal performance as a team is a function of many factors, including effective communication and collaboration, but even these attributes are not as impactful without ensuring the voices of those willing to articulate new and different perspectives are represented in the discussion. These voices help us come closer to representing the breadth and diversity of the clients and communities we serve.

For this reason, we seek to embrace the benefits of diversity as an embedded aspect of our culture. Throughout this report, you will see quotes from Angeles team members discussing how they seek to contribute to this effort. Our goals for this annual report are for it to serve as an indicator of our progress as well as an authentic reflection of how we want to evolve.



Sapna Shah
Managing Director
DEI Committee, Chair



Michael Rosen
Chief Investment
Officer



Howard Perlow
Chief Executive Officer
Angeles Investments



Derek Kellman
Investment Officer
DEI Committee, Head
of Talent Acquisition



Jon Foster
President & CEO
Angeles Wealth
Management



Anna McGibbons
Sr. Managing Director
ESG Committee Chair



Marta Ferro
Sr. Managing Director
Philanthropy Services



Sandra Kridel
Managing Director
Head of Human
Resources



ANGELES AT A GLANCE

Angeles advances our clients' goals and missions through custom construction and management of dynamic, conviction-led portfolios, delivered through a full-service investment office.

Our mission is to enhance our clients' ability to serve their constituents and communities by providing the resources of a comprehensive investment office and the experience and framework necessary for sound governance.




OVERVIEW OF ASSETS UNDER MANAGEMENT

ANGELES INVESTMENT ADVISORS			ANGELES WEALTH MANAGEMENT	
~\$6B DISCRETIONARY ASSETS	~\$32B CONSULTING ASSETS	79 INSTITUTIONAL CLIENT RELATIONSHIPS	~\$1B DISCRETIONARY ASSETS	127 HIGH NET WORTH CLIENT RELATIONSHIPS

OVERVIEW OF ANGELES TEAM

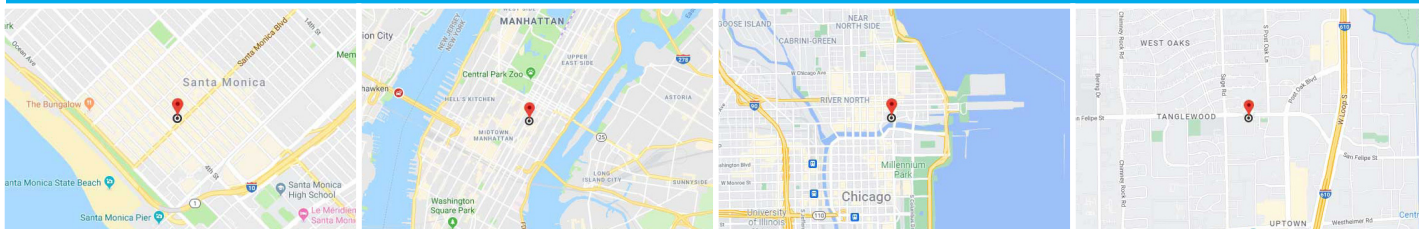
45 TOTAL EMPLOYEES ACROSS 4 LOCATIONS	100% EMPLOYEE-OWNED	25 YEARS AVERAGE INDUSTRY EXPERIENCE OF INVESTMENT OFFICERS
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ACHIEVEMENTS & ACCOLADES

		
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See disclosures regarding the Investment News DEI award, recognition as a Certified B Corporation™, and the Greenwich Quality Leader awards on page 19.

ANGELES LOCATIONS



SANTA MONICA

429 SANTA MONICA BLVD, SUITE 650
SANTA MONICA, CA 90401
310.393.6300

NEW YORK

375 PARK AVENUE, SUITE 2209
NEW YORK, NY 10152
212.451.9240

CHICAGO

400 N. MICHIGAN AVE, SUITE S1700
CHICAGO, IL 60611
312.212.6843

HOUSTON

5151 SAN FELIPE ST, SUITE 1480
HOUSTON, TX 77056
713.832.3670



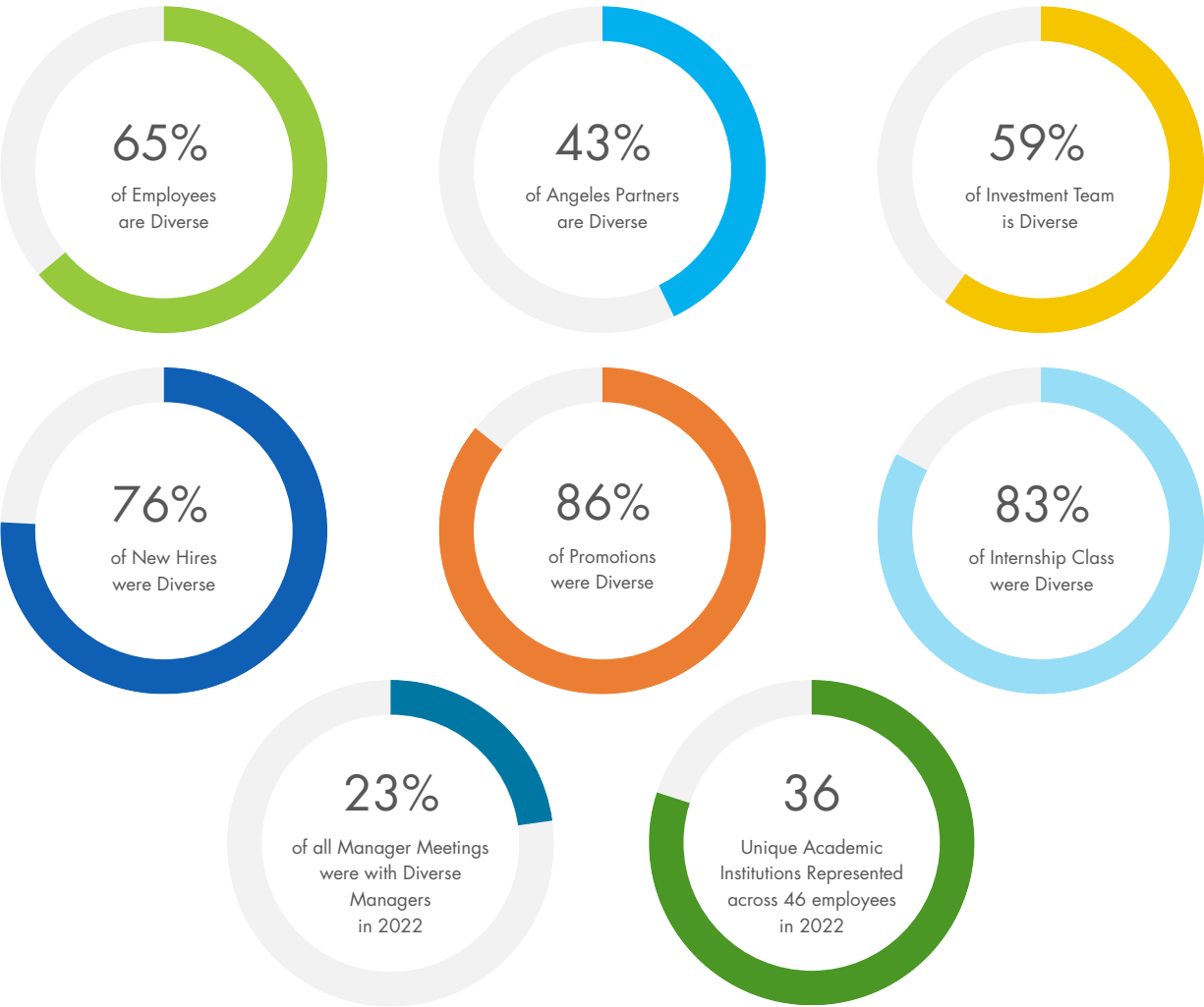
DIVERSITY, EQUITY & INCLUSION AT ANGELES

Angeles is committed to fostering, cultivating, and preserving a culture of diversity, equity, and inclusion.

The collective sum of the individual differences, life experiences, knowledge, inventiveness, innovation, self-expression, unique capabilities, and talent that our colleagues invest in their work represent a significant part of not only our culture, but also our reputation and company's achievement.

We embrace and encourage our colleagues' differences in age, color, disability, ethnicity, family or marital status, gender identity or expression, language, national origin, physical and mental ability, political affiliation, race, religion, sexual orientation, socio-economic status, veteran status, and other characteristics that make our employees unique.

REPORT HIGHLIGHTS DIVERSITY* AT ANGELES AS OF DECEMBER 31ST 2022



*Throughout this report, the term "diverse" in relation to our colleagues is broadly defined as women and people of color, unless otherwise stated.

** The term "diverse" in relation to managers is defined as managers owned by at least 50% women and people of color.



DIVERSITY, EQUITY & INCLUSION COMMITTEE

The Angeles DEI Committee develops and defines the organization's DEI strategies and tracks progress towards goals. The following individuals have taken on leadership responsibilities for our DEI effort as members of our DEI Committee.



Krushal Desai
Senior Associate,
Public Markets

"DEI is integral to a firm's success. I believe diversity of thoughts, experiences, and backgrounds, as well as an equitable and inclusive workspace, leads to better outcomes for employees and clients. This conversation is integral to our diligence process, and I have been encouraged by how receptive the industry has been to investor concerns regarding diversity, equity, and inclusion. I hope to keep pushing the envelope forward in my role at the forefront of our manager research efforts."

"My own philanthropy and many of my clients are working at the nexus of the social justice space and I endeavor to live my professional and personal life in a way that shares opportunities and values aligned with DEI on a daily basis. One example of something I have manifested at Angeles a number of years ago now, is the Angeles Art Fund. We educate our donors and fund at the intersection of the arts, philanthropy, justice and equity."



Marta Ferro
Senior Managing
Director



Derek Kellman
Investment Officer

"I believe a diverse culture increases creativity and innovation, which results in better outcomes for our clients and Angeles. By leading Angeles' diverse recruiting initiatives, I have the opportunity to grow our firm's diverse culture."

"Given my role as Head of Human Resources, my goal is to ensure benefits, compensation and development opportunities are as equitable as possible. I work closely with the senior leaders of the firm to ensure we are being as thoughtful as possible in our approach to DEI topics."



Sandra Kridel
Managing
Director



Anna McGibbons
Senior Managing
Director

"I find it unbelievable that a report by Knight Foundation notes that only 1.4% of assets of more than \$82 trillion of US assets are managed by asset management firms owned by women and/or people of color, despite diverse-owned firms' investment performance matching those of their less-diverse peers. I am personally motivated and committed to moving this statistic up."



“As co-founder of Angeles, I encourage our team to advocate across the asset management industry stakeholders expressing Angeles’ and our clients’ desire for diverse investment teams. The firm’s approach is one of engagement across the industry to increase awareness and understanding of our clients’ expectations.”



Howard Perlow
**Managing
Member**



Evie Raikh
**Director, Public
Markets**

“DEI is an important part of our manager approval process and our ongoing conversations with managers. We have been pleased that an increasing number of managers have recognized the importance, from an investment perspective, of having a diversity of backgrounds and viewpoints. We see this play out empirically in the number of diverse hires managers have added to their investment teams.”

“I oversee a number of efforts to celebrate the diversity of our team, including the celebration of various cultural holidays and team building events. I very much enjoy this aspect of my role as a way of expanding our perspectives and building community.”



Sydney Reinhardt
**Executive
Assistant**



Sandy Sy
**Senior Research
Analyst**

“I believe that a community of individuals from diverse cultures and backgrounds enables a firm to have richer perspectives and enhances its existing strengths. Being able to advocate for DEI has empowered me to continue creating a culture of inclusivity in this industry and beyond.”

“Ultimately, talent and character transcend identity dimensions, so there is no reason why women and people of color should not be fairly represented in our industry in all roles and levels. A diverse team is evidence of an organization recognizing that a breadth of experiences and viewpoints are critical for success. As Head of the DEI Committee, my goal is to ensure we align our internal resources so we can embrace the inclusion of underrepresented groups within our organization and industry.”



Sapna Shah
**Managing
Director**



Adrienne Tong
**Investment
Analyst**

“Our DEI questionnaire gives me the opportunity to engage with our approved managers and track progress on their DEI initiatives over time. This way all parties are held accountable as more clients are interested in this space than ever.”

DIVERSITY, EQUITY & INCLUSION AT ANGELES

The DEI Committee establishes and monitors annual DEI goals based on input from teammates, firm leadership, clients, and best practices established by industry groups.

	2022 Goals	2022 Highlights
Team Engagement	<ul style="list-style-type: none"> • Regularly communicate DEI objectives • Support team members’ DEI leadership • Meaningfully engage on DEI topics 	<ul style="list-style-type: none"> • Biannual firm-wide DEI communication • Continued educational events • Initiated culture roundtable series
Investment Manager Engagement	<ul style="list-style-type: none"> • Maintain ongoing dialogue related to DEI issues • Iteratively enhance analysis of manager DEI data • Increase dialogue with diverse managers 	<ul style="list-style-type: none"> • Revamped DEI / ESG questionnaire to focus on most impactful questions and support better analysis of DEI data • Communicated our clients’ desire for progress to senior leadership teams at investment management firms • Increased diverse manager engagement by 18% year over year
Client Engagement	<ul style="list-style-type: none"> • Offer transparent reporting on progress • Iteratively improve DEI client dashboard 	<ul style="list-style-type: none"> • Distributed inaugural annual DEI report • Refreshed presentation materials
Advocacy	<ul style="list-style-type: none"> • Develop and publish DEI thought leadership • Join and contribute to industry groups supporting DEI leadership 	<ul style="list-style-type: none"> • Published case study on Angeles engagement with manager to support diversity • Joined additional DEI industry groups to share, learn and leverage best practices



TEAM ENGAGEMENT

CULTURE ROUNDTABLE

The DEI Committee initiated a series of culture roundtables, with the first focusing on psychological safety. This was identified as an important topic to ensure Angeles actually reaps the benefit of diverse identities and perspectives. Leveraging the learnings from Dr. Amy Edmonson, Professor of Leadership and Management at the Harvard Business School, the group (consisting of 73% of staff) anchored the discussion on how to ensure people collaborate and learn to achieve high team performance. Much of the discussion focused on creating meeting structures and processes that allow colleagues to most effectively and comfortably contribute to meetings.



COMMUNICATIONS & EVENTS

The DEI Committee distributed updates around its progress, goals and objectives in biannual firmwide communications.

This year, we hosted an educational luncheon on Martin Luther King Jr. Day to remember his legacy as well as a luncheon in honor of National Hispanic-Latino Heritage Month. Additionally, we

distributed communications to remind teammates of the significance around Juneteenth and Pride Month.

PHILANTHROPY

Similar to the prior year, Angeles engaged all employees to help select philanthropic organizations aligned to causes important to them. For the second year in a row, Angeles has donated to a number of organizations advancing Diversity, Equity & Inclusion, including:

- [Los Angeles Education Partnership \(LAEP\)](#)
- [Leadership Enterprise for a Diverse America \(LEDA\)](#)



VOLUNTEERISM

In addition to supporting an annual volunteer event, all Angeles employees are given 8 hours of Volunteer Time Off and encouraged to support causes important to them through Board Service. We actively encourage Angeles employees to participate in company-sponsored volunteer events, utilize VTO, or serve on a Board to support their local communities.

LOOKING AHEAD

We plan to continue our culture roundtable series, acknowledge and provide education around days of significance, as well as maintain our commitment to volunteerism and philanthropy. Going forward, we hope to better quantify our colleagues' perspectives on this question: "Do you believe Angeles supports a culture of inclusion in which you feel a sense of belonging and diverse identities and perspectives are embraced? What can we be doing better?"



INVESTMENT MANAGER ENGAGEMENT

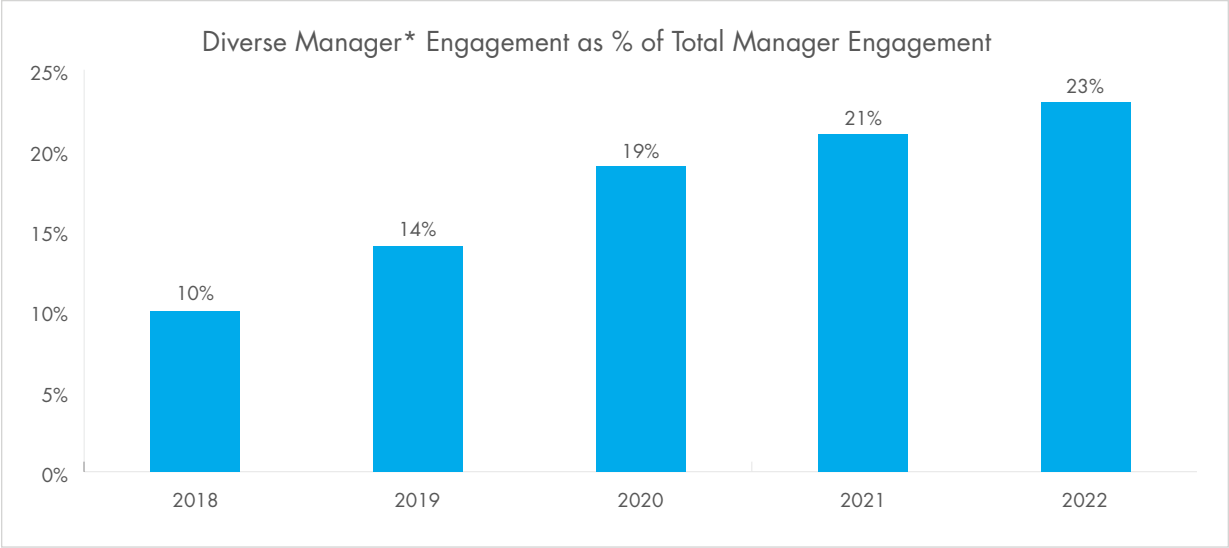
Angeles is committed to fostering DEI progress amongst prospective and existing managers and supporting diverse managers.

On an annual basis and as part of our initial diligence process, we require managers to complete a questionnaire that utilizes the latest industry standards to collect data on gender and race across managers' employees, firm leadership, investment team leadership, investment team, non-investment team, and employee-owners.

During regular meetings, we proactively encourage managers to improve their firm, team, and leadership related to DEI. [In 2022, we published a case study](#) showcasing our partnership with managers to support diversity in the industry.

We integrate DEI considerations into our manager research process. Team and firm diversity are an important part of our analysis of firms and their resources, including understanding how firms cultivate the diversity and inclusion of their teams.

Angeles has been steadily increasing its engagement with diverse managers with the goals of staying up-to-date on talent in the industry, acting upon interest from our clients, and researching prospective investments in our Angeles suite of funds.



*Diverse-owned managers are those with 50% or more ownership by women/people of color as of 12/31/2022. Metric represents number of unique manager engagements across existing and new diverse managers.

LOOKING AHEAD

We seek to further expand our manager DEI data analysis, engage robustly with existing managers on their DEI strategy, continue diverse manager engagement, and maintain focus on identifying promising emerging managers, particularly in the alternative investment space.



CLIENT ENGAGEMENT

Angeles has a framework for a qualitative and quantitative evaluation of managers’ DEI efforts and initiatives and regularly communicates this information to clients. A sample is provided below:

DIVERSITY, EQUITY & INCLUSION SAMPLE DASHBOARD						
Fund Managers	Women/Minority Owned/Led Firm	Above Avg. Diverse Recruiting/Internship	Chief Diversity Officer or Committee	Diversity Goals and Progress	% of Diverse * All Employees	% of Diverse * Investment Team
Manager 1		✓	✓	✓	68%	55%
Manager 2	✓	✓	✓	✓	54%	46%
Manager 3					50%	54%
Manager 4		✓		✓	55%	48%

Angeles collects and tracks detailed data on diversity across gender and race/ethnicity for all existing managers on which we conduct diligence. We can customize the depth and frequency of sharing this information with clients according to each client’s specific preferences.

Additionally, we work with clients and third-party shareholder advocacy firms to file shareholder resolutions, on behalf of our clients’ shares held, and on DEI issues (for example, greater disclosure on material corporate diversity, equity, and inclusion data).

CLIENT EXAMPLES: DEI INCORPORATION INTO INVESTMENT POLICIES & PORTFOLIOS

DIVERSITY GOAL IN IPS

An Angeles Foundation client modified their Investment Policy Statement to articulate a specific goal for diverse managers. Specifically, this client is targeting a minimum of 50% of overall assets be managed by qualified diverse managers before the end of calendar year 2025. Angeles proactively seeks out qualified diverse managers across all asset classes and tracks progress toward our client’s manager diversity goal in quarterly reporting.

RACIAL JUSTICE INVESTMENT PORTFOLIO

Angeles has several foundation clients that utilize a passive racial justice strategy designed to tilt towards companies that score well in diversity and racial equity while avoiding companies with poor diversity metrics.

LOOKING AHEAD

We will continue to partner with our clients on this journey and ensure we engage in robust dialogues on how we can improve our efforts on their behalf. To do so, we plan on continuously seeking feedback and iteratively improving data collection, analysis, and reporting capabilities.



ADVOCACY

Angeles looks forward to supporting and contributing the following organizations through our membership and advocacy:

INVESTMENT DIVERSITY ADVISORY COUNCIL (IDAC): IDAC is an independently operated forum for the nation's largest institutional investors to discuss the academic, empirical, and business cases that support diverse decision-making, best practices to promote diversity in finance, and data-driven strategies to track progress over time.

INSTITUTIONAL ALLOCATORS FOR DIVERSITY, EQUITY & INCLUSION (IADEI): IADEI is a consortium of asset owners – endowments and foundations, along with pensions, family offices, and other institutional investors – that seeks to drive diversity, equity, and inclusion within institutional investment teams and portfolios and across the investment management industry.

INSTITUTIONAL INVESTING DIVERSITY COOPERATIVE (IIDC): IIDC is a collection of some of the largest and most prominent institutional investment consultants in the industry. The members of the Cooperative are responsible for the stewardship of trillions of assets held by institutions in retirement plans, employee health funds, endowments, foundations, operating funds and capital reserves, among others.

WOMEN IN INSTITUTIONAL INVESTMENTS NETWORK (WIIIN): WIIIN is a Los Angeles-based forum for women in institutional investing. WIIIN's primary goal is to strengthen relationships and facilitate a dialogue to advance and empower women in the Southern California institutional investment community.

CONFLUENCE PHILANTHROPY: Confluence Philanthropy's mission is to transform the practice of investing by aligning capital with values of sustainability, equity, and justice. Confluence Philanthropy supports and catalyzes a membership network of over 250 private, public and community foundations, family offices, individual donors, and their values-aligned investment advisors.

CEO ACTION FOR DIVERSITY & INCLUSION: CEO Action for Diversity & Inclusion™ is the largest CEO-driven business commitment to advance diversity and inclusion in the workplace.

Angeles sought to advance DEI more broadly through the following publications and new stories:

[Inaugural DEI report:](#) Angeles published its first DEI report in February 2022, covering the 2021 calendar year.

[Manager Engagement Case Study on DEI:](#) Angeles partnered with private credit manager to support greater diversity within their investment team.

[Why Wealth Management's Diversity Issues Go Deeper Than Demographics:](#) Financial Planning article on fostering an environment to support the success of traditionally underrepresented talent.

[InvestmentNews Annual 2022 Diversity, Equity & Inclusion \(DEI\) Award for Outstanding Practice:](#) This award recognizes internal and external firm initiatives at financial advice firms specifically developed to increase diversity, equity and inclusion of the firm or its clients.

LOOKING AHEAD

Our goal through industry membership is to focus on making impactful contributions, so we will seek to engage more deeply with the organizations with whom we are involved. We also want to continue efforts to develop and support thought leadership in this space.



INTERNAL PROCESS ADJUSTMENTS

FOCUS ON PHELPS FORWARD

[Phelps Forward](#) provides career counseling, networking and job placement to first-generation college students and graduates, all women, from top-tier colleges.

Angeles has worked with Phelps Forward since 2020. Since that time, we have hired four full-time Phelps Forward alumni. We've partnered with Phelps Forward to hire three interns in the summer of 2021 and an additional three interns in the summer of 2022.

In November, Sapna Shah engaged Phelps Forward interns and alumni in a discussion on "Building a Successful Life & Career." Phelps Forward alumna Adrienne Tong has played an active role in the engagement and partnership with prospective Phelps Forward talent.



2022 Summer Intern Class

FOCUS ON SOURCING TALENT

This year, our team undertook an exercise to evaluate how we currently source talent and ways we could further expand the breadth of our outreach to attract an even more robust pipeline of candidates.

Based on that exercise, we instituted the following modifications to our processes: 1) established a list of organizations with whom we could potentially partner to source a more diverse candidate base, 2) reached out to Historically Black Colleges & Universities to confirm engagement opportunities, and 3) expanded utilization of technology platforms like Handshake to reach a broader scope of schools.

FOCUS ON BENCHMARKING

We are tracking diversity data from the [Diverse Asset Managers Initiative](#) and the [U.S. Bureau of Labor Statistics](#) to understand how Angeles compares to other comparable firms and the industry more generally. This information helps inform our talent sourcing efforts.

We also review information and research from other diversity-focused organizations such as the [Lean In: Women in the Workplace Study](#) and the [Consumer Financial Protection Bureau Report on Diversity & Inclusion within Financial Services](#), as well as surveys on workplace trends that could better inform our practices such as [PWC's Hopes and Fears 2021](#) study.

LOOKING AHEAD

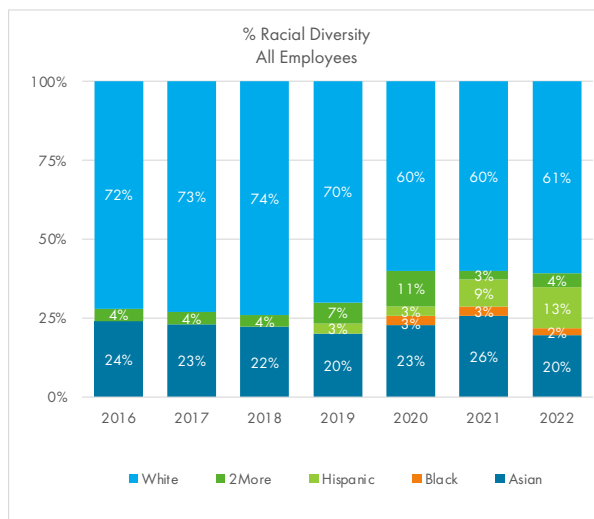
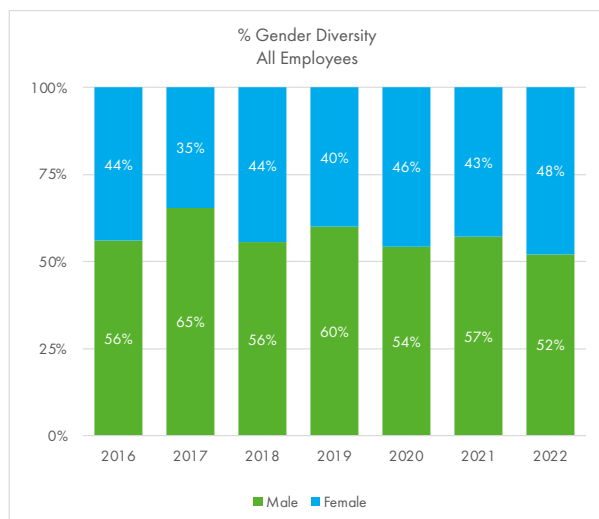
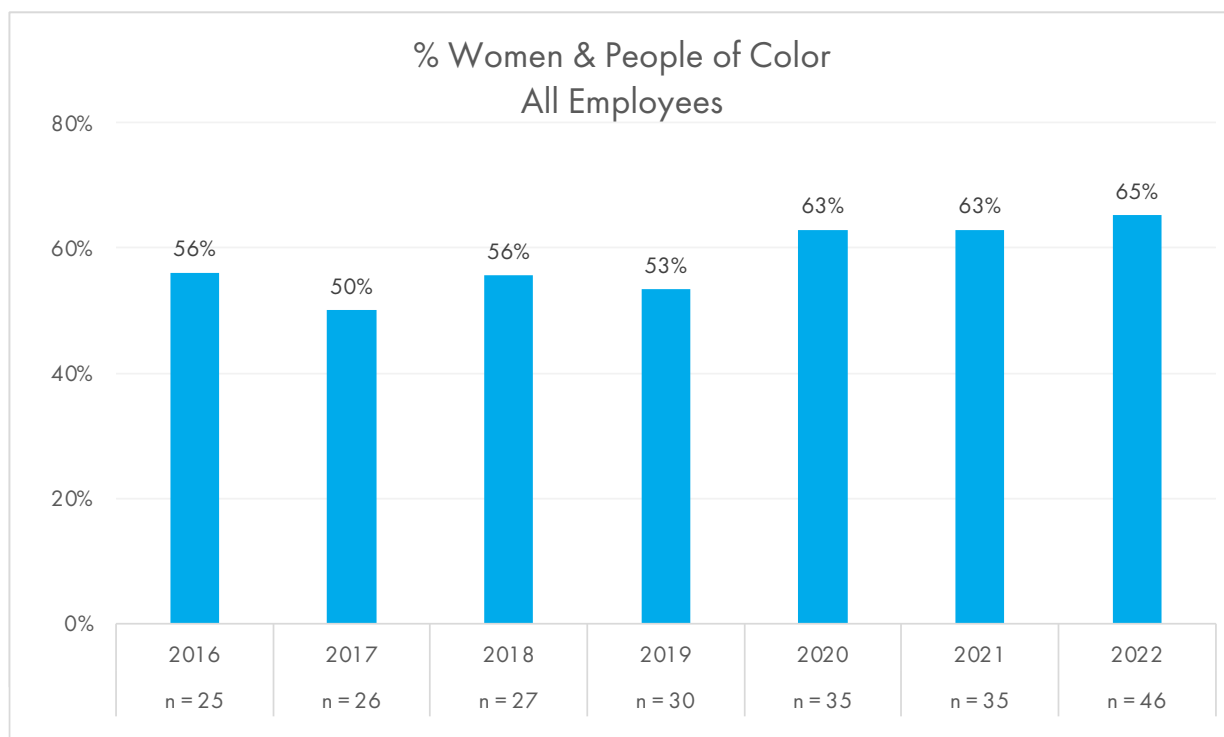
We seek to better collect data that can inform the understanding of diversity within our organization and iteratively improve this process over time. In 2022, we focused on collecting data to help us better understand cognitive dimensions of diversity. We hope to supplement this information with additional data we can gather through a survey process. Most critically, we continue focusing on firmwide processes related to compensation, benefits, and talent development to support workplace equity.



ANGELES' RACIAL & GENDER DIVERSITY HISTORY

ALL EMPLOYEES AS OF 12/31/2022

Angeles has been growing, with our employee base increasing by ~66% over the last 5 years. During this growth phase we've specifically expanded our private markets research and wealth management teams, and sought to be mindful of the diversity of talent, with the specific goal of increasing diversity amongst underrepresented populations.

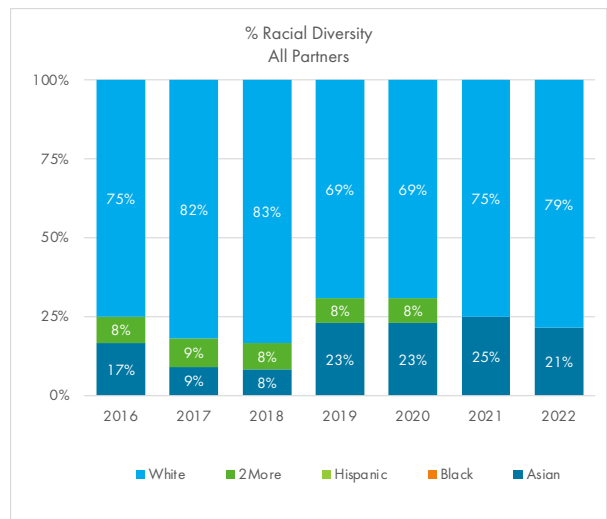
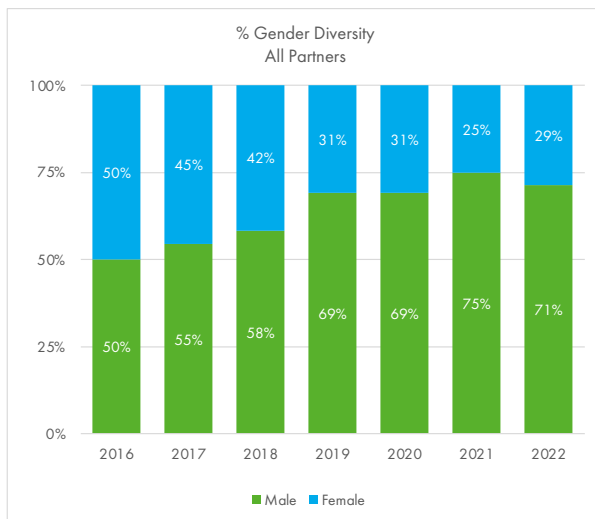
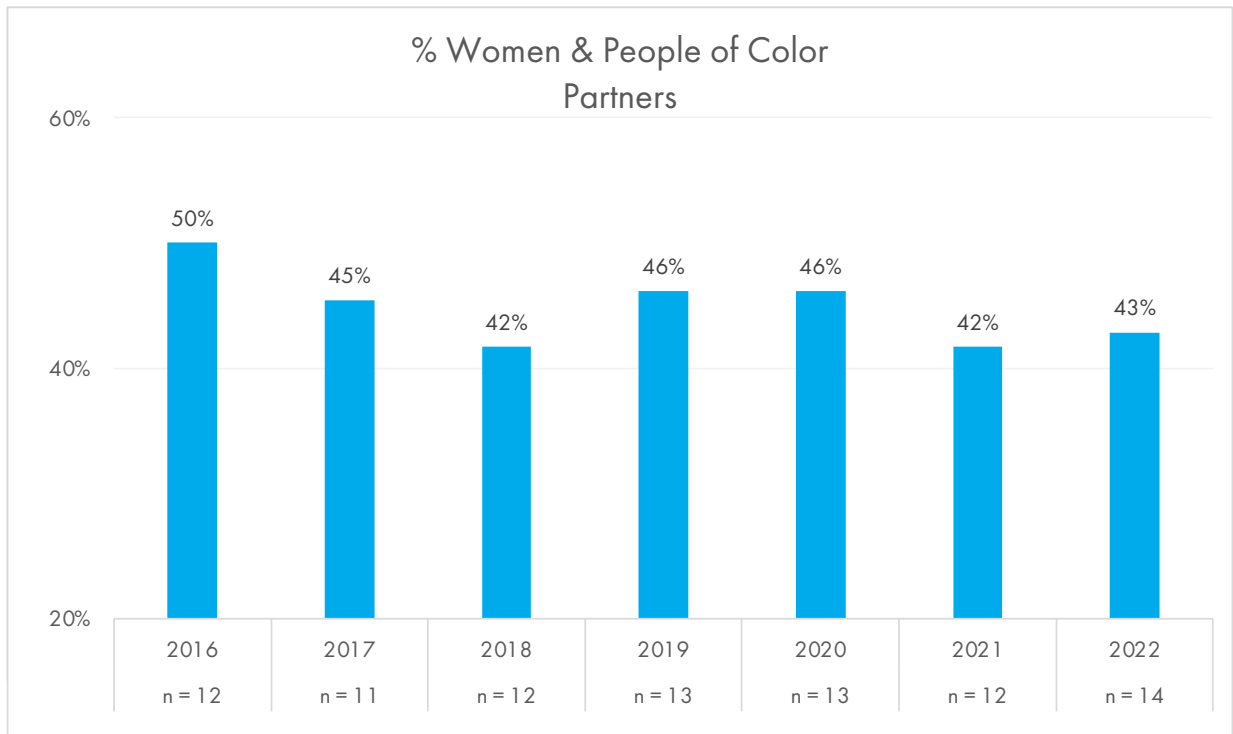


*Numbers may not add up to 100 due to rounding



ANGELES' RACIAL & GENDER DIVERSITY HISTORY PARTNERS/OWNERS AS OF 12/31/2022

The partner group, defined as individuals who own equity in Angeles, constitutes about ~30% of all employees. Going forward, as we plan future distributions of equity to an increasingly diverse organization, we are mindful of ensuring firm ownership is distributed equitably.



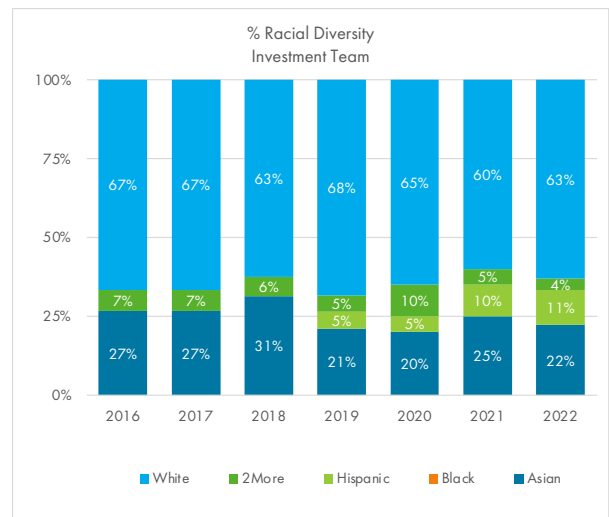
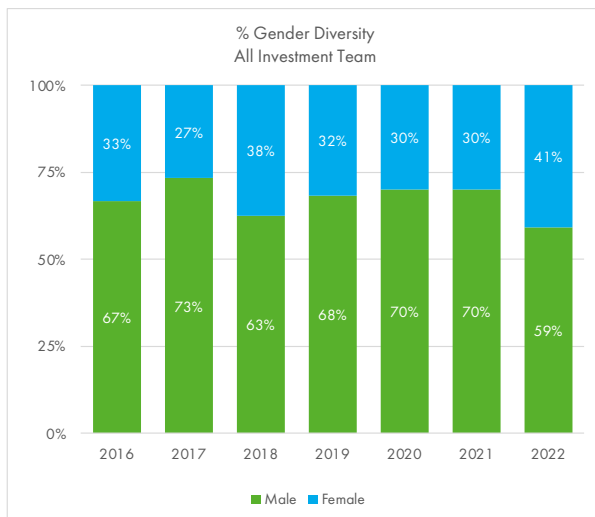
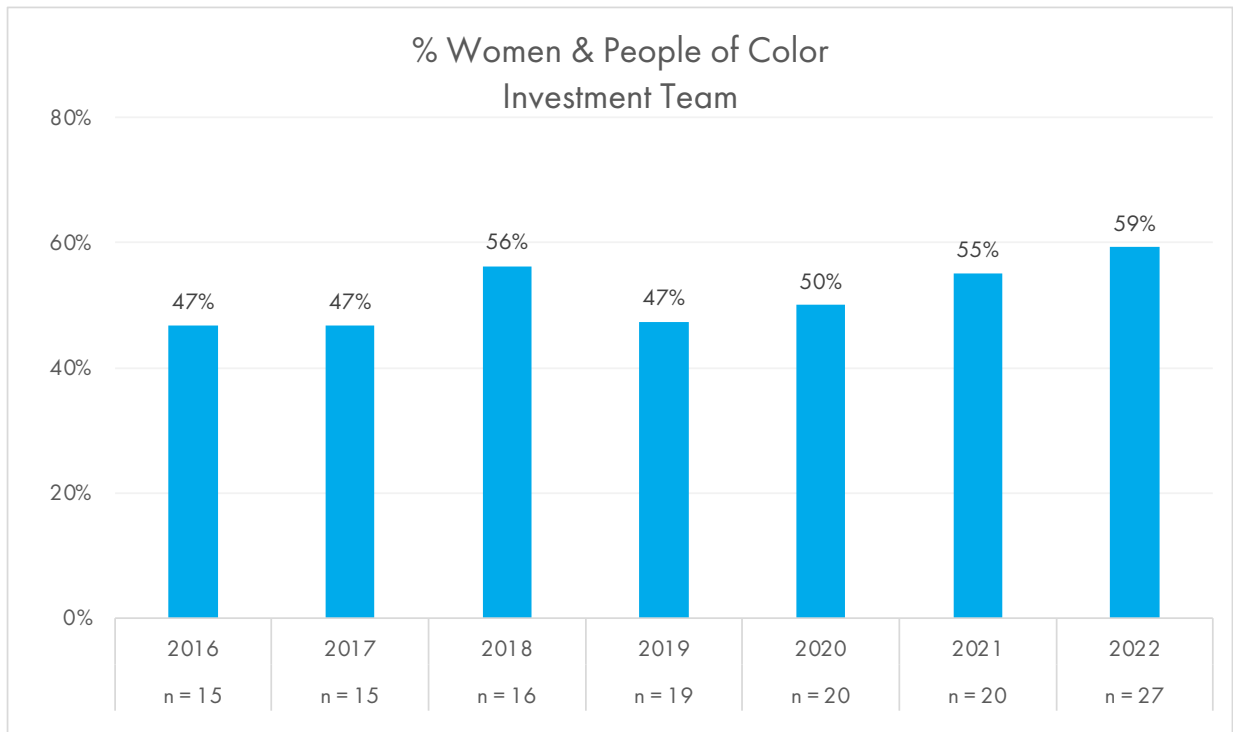
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ANGELES' RACIAL & GENDER DIVERSITY HISTORY

INVESTMENT TEAM AS OF 12/31/2022

The diversity of the investment team, defined as Investment Officers, Investment Staff primarily engaging with Institutional & Wealth Management clients, as well as Investment Analysts and Manager Research teams, has stayed relatively constant over the past five years. Going forward, the goal is to elevate newer hires into increasing roles of leadership and ensure we have a strong pipeline of talent for Investment roles.

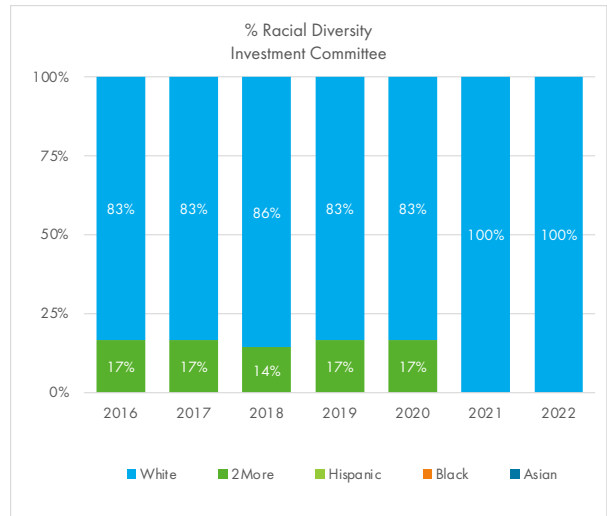
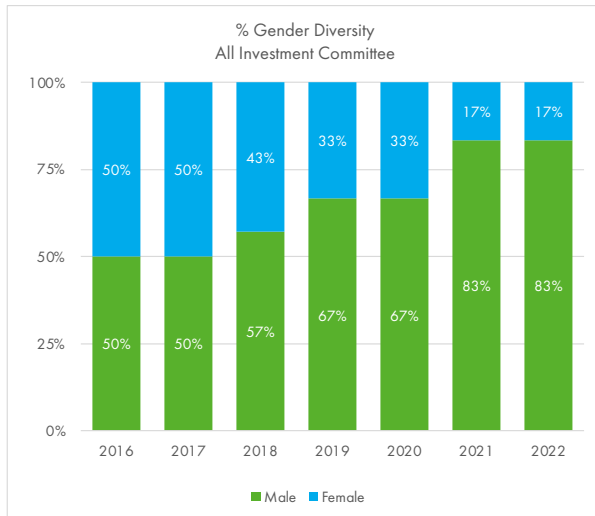
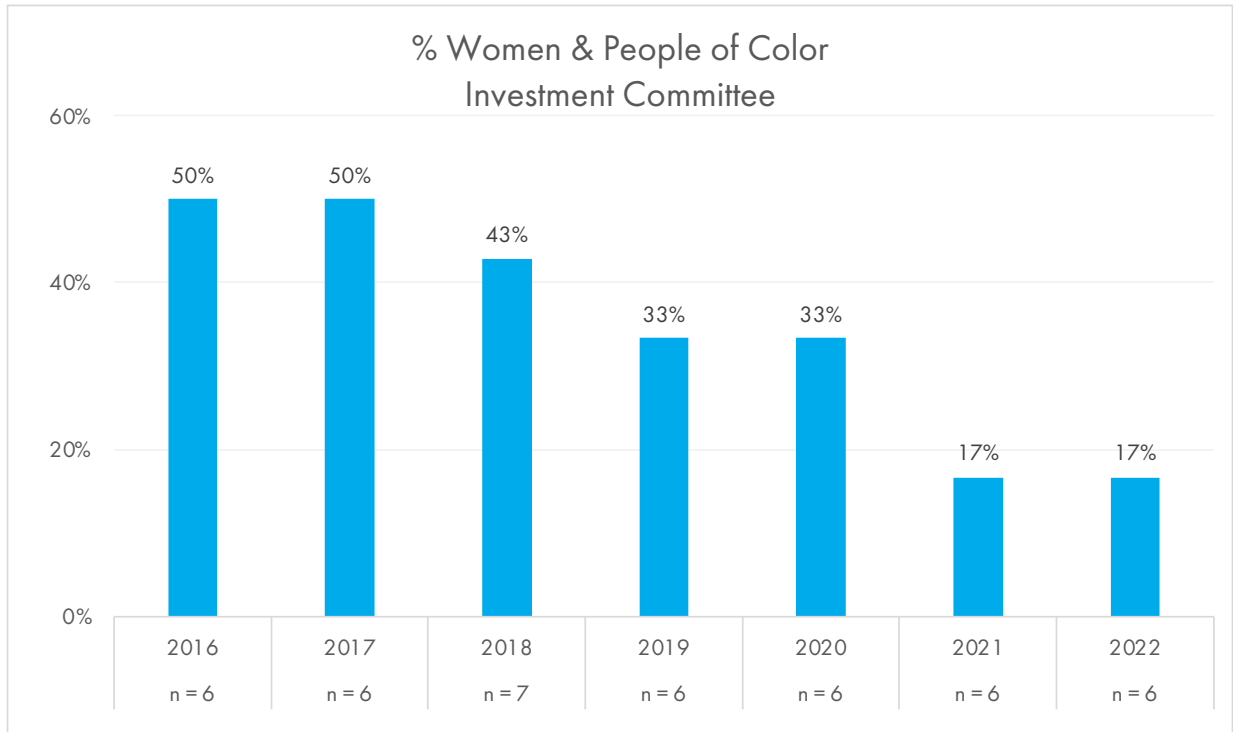


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ANGELES' RACIAL & GENDER DIVERSITY HISTORY INVESTMENT COMMITTEE AS OF 12/31/2022

The Investment Committee at Angeles approves new managers on behalf of clients and Angeles Funds. They are responsible for ensuring managers meet the appropriate bar, both from an investment perspective and DEI perspective. As the team is small, generally between 6-7 people, there have been fluctuations in its diversity composition over the last few years. Looking forward, the intent is to ensure Angeles develops a strong pipeline of diverse talent for Investment Committee positions.



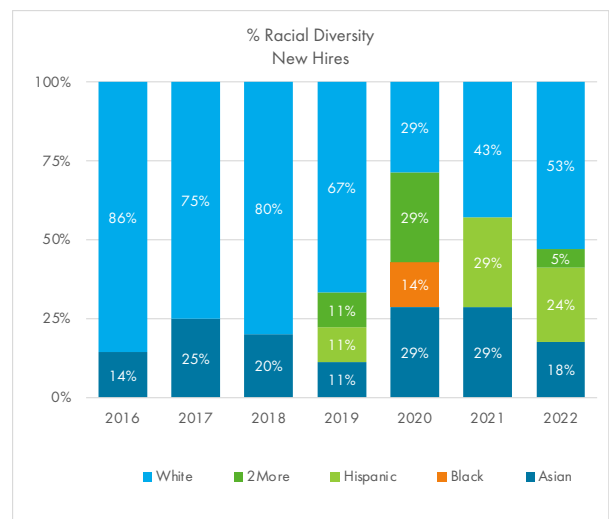
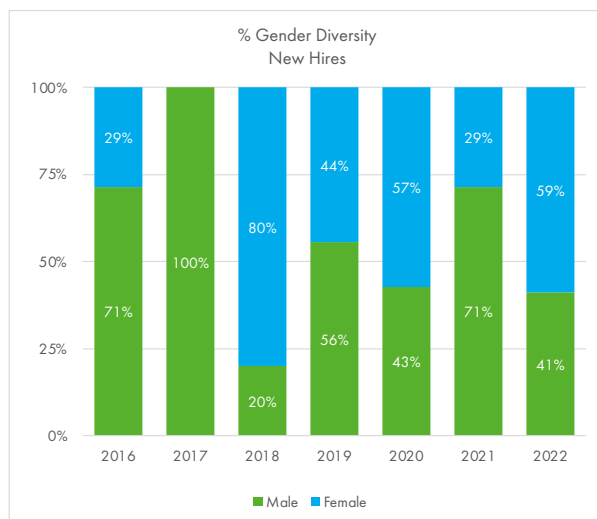
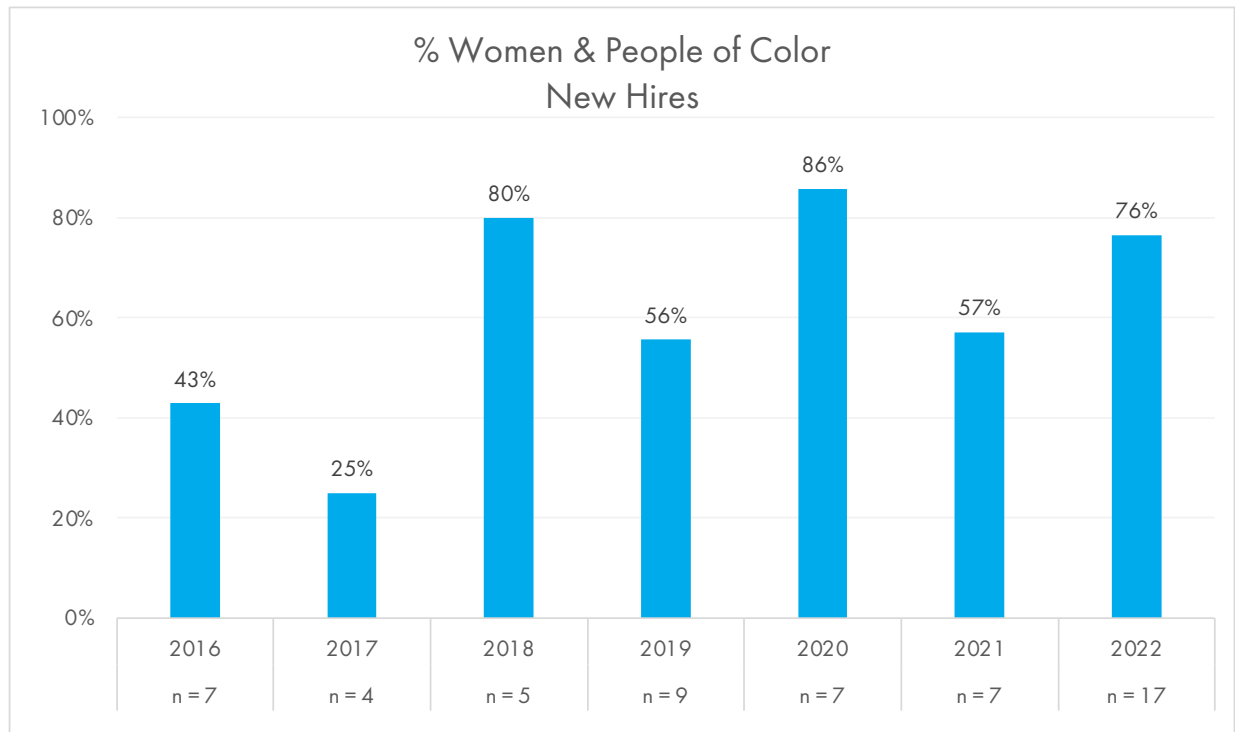
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ANGELES' RACIAL & GENDER DIVERSITY HISTORY

NEW HIRES AS OF 12/31/2022

Over the last five years, 63% of new hires have been women and people of color. In 2022, Angeles hired a significant number of employees for our organization's size, and made efforts to expand the breadth of our outreach for new positions, particularly post-undergraduate roles. Our goal is to continuously improve our hiring processes to ensure we source high-caliber talent from a broad talent pool and create an environment that supports the development and success of new employees.



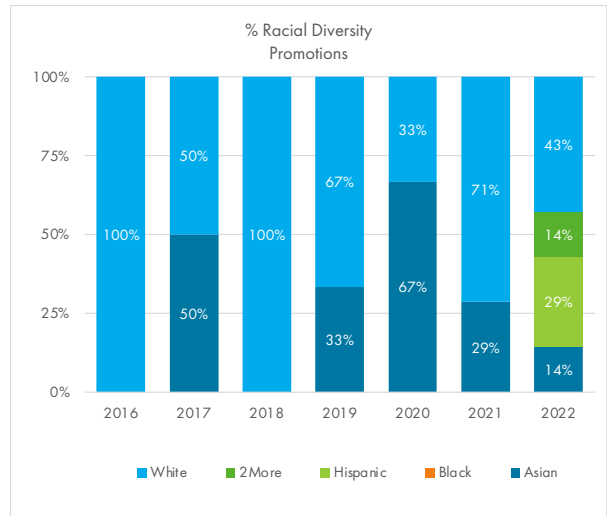
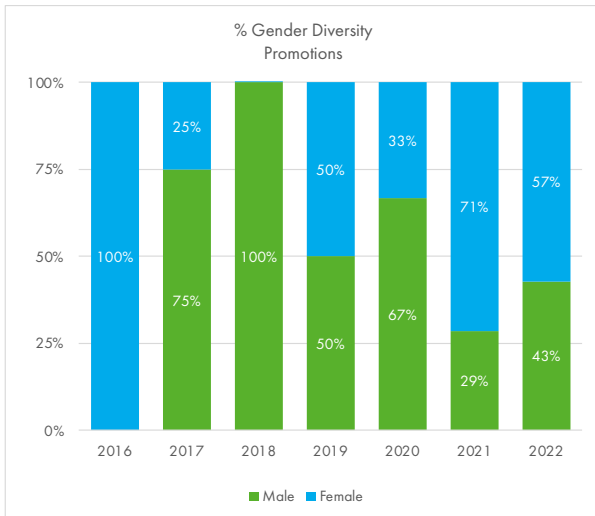
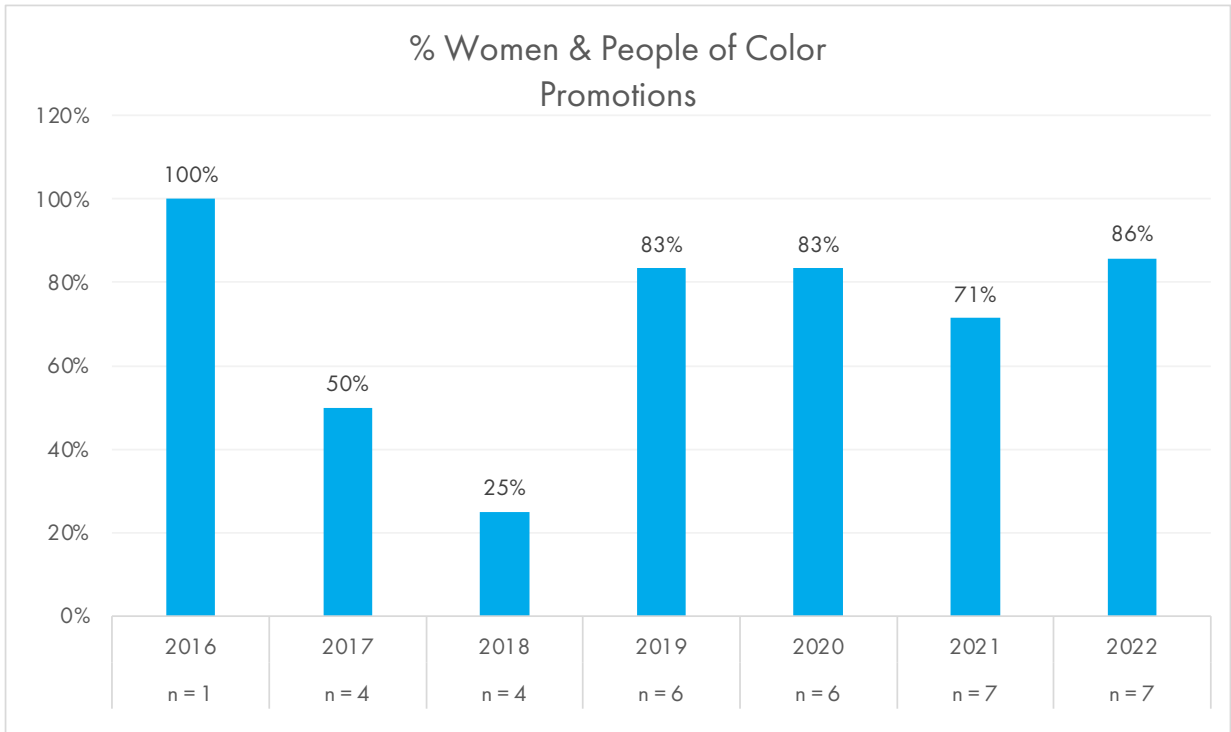
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ANGELES' RACIAL & GENDER DIVERSITY HISTORY

PROMOTIONS AS OF 12/31/2022

Over the last five years, 67% of promotions have been women and people of color. To a certain degree, this reflects historical hiring trends in junior roles, however, it is vital that the firm cultivates a diverse employee base, not just in aggregate but across all levels of the organization. To achieve our goal, a critical part of our strategy must be developing promising talent and attracting and retaining diverse talent.



*Numbers may not add up to 100 due to rounding



DISCLOSURES

B Corporation

The rating was given by B Lab™ Global on January 29, 2023, and will cover the time period from January 2023 to January 2026 at which time Angeles will be recertified. Angeles pays an annual fee to maintain this membership. Angeles Wealth was not examined in the certification process.

Investment News DEI Award

Award Info/Criteria:

- The Excellence in Diversity, Equity, & Inclusion Awards recognize firms for their efforts to foster diversity, equity, and inclusion within their own practice or within the financial advice profession. The Outstanding Practice Awards honors firms with initiatives that demonstrate results showing a transformation of the organizational makeup or culture of the firm or its client base through the inclusion of diverse groups. The Diversity Champion Awards recognize firms that have internal programs to increase diversity or external campaigns to improve financial literacy among diverse groups in the financial advice business.
- Angeles' initial nomination submission outlined the firm initiatives developed to increase DEI among firm's leadership and broader employee base. Per InvestmentNews, over 100 firms submitted nominations. After submitting the application, Angeles was selected to engage in a 45-minute interview with an InvestmentNews reporter, before being notified Angeles was 1 of 6 selected as finalists for Outstanding Practice.
- The award was granted in June 2022, and covers the period from January 1, 2021, to December 31, 2022. InvestmentNews was not compensated for this award.

Greenwich Quality Leader

Angeles was designated as a Greenwich Quality Leader in Overall U.S. Investment Consulting among midsized advisors in the 2017, 2018, 2019, 2020, 2021, and 2022 surveys. The study is primarily based on responses from Angeles clients. Angeles does not pay to have its clients participate in the study. The 2022 study covers 727 institutional clients, including 14 Angeles clients. The results are not indicative of future performance and may not be representative of any one client's experience because the results represent an average of all of the experiences of responding clients only.





PASSION. INTEGRITY. RESULTS.

ENHANCING OUR CLIENTS' ABILITY TO SERVE THEIR CONSTITUENTS AND COMMUNITIES, BY PROVIDING THE RESOURCES OF A COMPREHENSIVE INVESTMENT OFFICE AND THE EXPERIENCE AND FRAMEWORK NECESSARY FOR SOUND GOVERNANCE.

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