Angeles

Angeles Investment Advisors Appoints Shannon Morton as Senior Managing Director

Appointment strengthens institutional investment expertise amid broader Angeles Investments expansion in Texas

Santa Monica, CA – November 3, 2026 — **Angeles Investment Advisors** ("AIA"), an outsourced chief investment officer for endowments, foundations and other nonprofit institutions, today announced the appointment of **Shannon Morton**, **CFA**, who joins the firm as **Senior Managing Director**. This strategic addition reflects Angeles Investments' ("Angeles") longstanding commitment to assembling a team of accomplished professionals united by a shared investment philosophy and dedication to clients.

Based in Houston, Texas, Morton brings 30 years of experience in global asset management and institutional investment advisory to AIA, where she will advise foundations, endowments and nonprofit institutions on investment strategy, asset allocation, portfolio construction and risk management.

"What attracted me to Angeles was its client- centered approach, the depth of its investment expertise, and its commitment to delivering highly customized investment solutions," said Morton. "Having spent much of my career working alongside foundations, endowments and investment committees, I know that successful institutional investing requires more than strong investment capabilities. It requires a deep understanding of each organization's mission, a disciplined long-term perspective, and a genuine partnership built on trust. Angeles has built a distinctive model that combines sophisticated investment resources with the personalized attention and flexibility institutions value. I'm excited to join a team that shares my commitment to thoughtful investment leadership."

Prior to joining AIA, Morton served as Senior Vice President and Senior Investment Officer at Northern Trust, where she led the West Region investment team for the Foundation and Institutional Advisors group and helped lead the national investment team. Previously, she was a director and investment strategist at BlackRock within the BlackRock Investment Institute. She also held senior investment and leadership roles at AllianceBernstein, Covariance Capital Management and Invesco/AIM Investments. Her career spans investment research, portfolio management, institutional investment strategy and business development across leading global asset managers and investment advisory firms.

Morton is a CFA charterholder and holds a Bachelor of Business Administration in Finance from the University of Texas at Austin. She also serves on the investment committee for Community Health Choice, a Texas-based nonprofit managed care organization.

Founded in 2001 as an outsourced investment office for institutions, AIA serves as a co-fiduciary and extension of its clients' investment teams, providing comprehensive oversight across portfolio management, manager selection, governance, operations and reporting. Morton joins a team of experienced investment professionals dedicated to helping institutions navigate complex investment decisions while aligning portfolios with their long-term missions, spending policies and liquidity needs. AIA's institutional investment expertise and solutions also serve as the foundation for the broader Angeles platform, extending to Angeles Wealth Management and Angeles Family Office to provide individuals and families with the same sophisticated investment strategies, research and manager access historically available to institutional clients.

"Angeles was founded on the belief that institutions deserve a dedicated investment partner who understands their unique objectives and brings the full depth of institutional investment expertise to every client relationship," said Howard D. Perlow, Chief Executive Officer. "Shannon shares that philosophy. She combines extensive experience in global markets and portfolio construction with a deep understanding of the challenges facing institutions and their investment committees. Her addition strengthens our investment team and reinforces our commitment to delivering highly customized solutions as we expand our institutional presence in Texas and beyond."

Morton's appointment further strengthens Angeles' presence in Texas, where the broader organization serves institutional, private wealth and family office clients through its offices in Dallas and Houston. Together, AIA, Angeles Wealth Management and Angeles Family Office advise approximately $15 billion in assets for clients across the state.

For more information about Angeles Investments and its global multi-asset investment solutions for institutions, individuals and families, please visit **its website**.

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About Angeles Investment Advisors

Founded in 2001, Angeles Investment Advisors is a global multi-asset investment firm, managing customized portfolios for institutional investors in the United States and for select families through its affiliate, Angeles Wealth Management. Headquartered in Santa Monica, CA, the firm oversees $7.7 billion in discretionary assets and $36.2 billion in advisory client assets as of June 30th, 2026, and is an advisor to recognized endowments, foundations and institutions.

About Angeles Wealth Management

generationally wealthy families. Providing high-net-worth and ultra-high-net-worth families with comprehensive wealth advice and institutional-quality investment solutions typically available to large institutional investors, the firm's private wealth clients gain access to an institutional caliber investment process and opportunity set by investing alongside its affiliate, Angeles Investment Advisors. Angeles Wealth, which oversees over $3.1 billion in assets under management (AUM) as of June 30th, 2026, works with the families it serves to understand their unique needs, including generational planning and family dynamics. Founded in 2011, Angeles Wealth and Angeles Family Office have offices in Santa Monica, New York City, and Houston. For more information, follow us on **LinkedIn** or visit **our website**.

About Angeles Family Office

Angeles Family Office is the dedicated family office affiliate of Angeles Wealth Management, serving ultra-high-net-worth families with a highly personalized approach to managing complex wealth. Built on Angeles Wealth's core strength in delivering comprehensive wealth advice and the institutional-caliber investment process and opportunity set of its affiliate, Angeles Investment Advisors, AFO integrates bespoke family office services spanning coordination of estate planning, bill pay, cash-flow management, balance sheet reporting, philanthropy, income statement preparation and more. Through these tailored solutions, AFO partners with families to address the full spectrum of their wealth and personal needs.

Angeles Investment Advisors, Angeles Wealth Management, and Angeles Family Office are SECregistered investment advisers.
Registration does not imply a certain level of skill or training.

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