A Look Under the Hood at TIFF

Jessica Portis, CFA, outlines her leadership at TIFF Investment Management, emphasizing goals for 2025 focused on delivering tailored investment solutions, enhancing operational efficiency, investing in team growth, and strengthening client relationships.

Jessica Portis, CFA joined TIFF Investment Management as head of member portfolio management and services in 2020 from Mercer, where she was a partner and oversaw the delivery of investment-related services to both advisory and outsourced nonprofit clients.

She was promoted to serve as chief client officer at TIFF in April 2024, where she is tasked with collaborating closely with the investment and client-facing teams to develop and execute investment solutions that cater to clients' unique objectives.

Portis took the time to answer five questions with FIN News.

1. What goals are you aiming to achieve in 2025 as you continue to collaborate with TIFF's investment and client-facing teams

Our mission at TIFF remains steadfast: to be the best outsourced cio and asset manager, delivering meaningful advice, strong investment outcomes and outstanding service. To achieve this, we have set three broad goals for 2025.

First, we aim to continue delivering strong investment outcomes to our clients by providing tailored investment solutions. We are committed to seeking differentiated strategies that drive value for our clients. Leveraging the insights from our advisory board of best-in-class cios and their tenure in the industry, our investment team will continue to scour the globe to identify best-in-class managers. The additional resources we have added across our investment and client-facing teams will enable us to extend our impressive 30+ year track record.

Second, we plan to enhance our operational efficiency by adopting new technology and tools to better serve our clients and broaden our service offerings. By leveraging these advancements, we aim to provide even greater value and a more streamlined experience for our clients.

Third, we are focused on investing in our people, as they are our most critical resource. We aim to support the growth and development of our talented team, fostering a culture of respect, intellectual curiosity and collegiality across our organization. This investment in our people ensures that we continue to deliver innovative solutions and exceptional service to our clients.

Our entire firm is committed to delivering on our mission. Despite the evolving market landscape, our dedication to providing exceptional investment solutions and supporting our clients' organizational goals remains unwavering. Our CEO Kane Brenan recently released his annual retrospective and outlook for those looking for further commentary on TIFF's strategy.

2. What is one challenging situation that you have faced since joining TIFF in 2020 and how did you reach a solution?

When I joined TIFF in 2020 amid the pandemic, I faced the significant challenge of transitioning roles while navigating the complexities of a fully remote environment. This situation was particularly challenging as it required building and maintaining strong relationships with both clients and colleagues during a period of heightened volatility.

Recognizing that we are fundamentally in a relationship-driven business, it was critical to ensure that we remained engaged and visible to our clients and potential clients. Our objective was to clearly articulate our value proposition and demonstrate how our solutions could help them achieve their investment goals, even in uncertain times.

To overcome these challenges, we employed creative strategies to foster client engagement. We scheduled virtual one-on-one meetings outside of traditional committee settings to provide more personalized interactions. Additionally, when possible, we arranged in-person meetings in outdoor settings, such as coffee meetings, to maintain a personal touch while adhering to safety protocols. We also increased the number of written and digital communications available to maintain visibility and open communication with clients.

These efforts not only helped us maintain strong client relationships but also reinforced our commitment to supporting our clients through adversity. By adapting our approach and prioritizing effective communication, we successfully navigated the challenges presented by the pandemic and continued to deliver value to our clients. We continue to leverage some of our learnings from that time in support of our relationship building today.

3. What is your favorite part of your role today? What gets

you excited to come to work?

As a member of TIFF's leadership team, I have the privilege of collaborating with talented professionals across the firm, including some of the most skilled investors in the industry. The dedication and passion our entire team has for serving our clients' missions is truly inspiring.

I am particularly passionate about serving the nonprofit community. Every day, I am honored to help nonprofits achieve their missions. I am constantly in awe of the incredible nonprofit organizations that exist in this country, each with a unique mission and a significant impact on the communities they serve. Hearing about the specific impacts these organizations have adds profound meaning to the work we do. This motivates me daily!

TIFF is experiencing growth, making every day an exciting new adventure. Whether it is assisting a long-term private foundation client in structuring their investment program to support larger, multi-year, more targeted grants, or helping a new client establish their endowment following a significant initial gift, the work we do is both rewarding and impactful.

Looking ahead to 2025, I am excited about the future. We have added outstanding talent to our investment and client-facing teams, and I am confident that their contributions will further enhance the value we provide to our clients.

4. You are no stranger to the industry having worked at investment consultant Mercer for more than seven years and before that with Summit Strategies Group for more than a decade – what did you take away from those prior experiences to use in your role today?

My experience as an investment consultant equipped me with valuable skills and insights that I carried into my current role. As an investment consultant, I primarily focused on providing strategic advice to clients regarding their investment programs. I developed a deep understanding of each client's unique circumstances and objectives, which allowed me to formulate tailored investment strategies. Once the overall strategy was defined, I presented investment ideas for committees to consider, working collaboratively to execute the agreed-upon investment program. My role involved building strong relationships with clients and gaining a comprehensive understanding of their needs. This client-centric approach has been instrumental in my current role, where I continue to prioritize understanding clients' financial circumstances and aligning investment strategies with their goals.

I joined TIFF because I believe the outsourced cio model offers a better opportunity for most nonprofit organizations to achieve their missions. TIFF's fully discretionary approach allows for more active management and execution of investment strategies, which has historically

led to strong investment outcomes for clients. The outsourced cio model takes on a more hands-on role, contributing meaningfully to performance over time. Five years ago, TIFF provided limited strategic advice to clients and did not tailor investment programs as extensively. Over the past several years, we have significantly enhanced our advisory offerings by focusing on linking clients' financial circumstances with their strategic asset allocation. This combination of strategic advice and TIFF's commitment to investment excellence has proven to be powerful in achieving clients' goals.

My consulting experience has provided me with a strong foundation in strategic advice, client relationship management and the importance of aligning investment strategies with client objectives. These skills have been invaluable in my role at TIFF, where we strive to deliver exceptional investment outcomes for our clients through a comprehensive and proactive approach.

5. What hobbies or activities do you enjoy doing in your spare time?

Today, my hobbies and current reading material align well with my interests. I enjoy staying physically active through various activities, including cycling on my Peloton, Pilates, weight training and yoga. These activities help me clear my mind and focus my efforts.

Currently, I am reading "Activate Your Greatness" by Alex Toussaint, who is a Peloton instructor. This self-help memoir aims to inspire readers to activate their greatness in all aspects of their lives. The book emphasizes the importance of setting clear goals, working consistently toward them, bouncing back from setbacks and maintaining a positive, growth-oriented mindset. Whether it is achieving personal fitness goals or excelling in our roles as leaders and stewards of our clients' capital, I believe it is essential to always strive for greatness. This involves having a focused approach to both personal and professional development.

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TIFF Investment Management



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