

## News From Aon

# Aon Delegated Investment Solutions reaches \$100 billion in worldwide assets under management

*In North America, total assets under management have grown to nearly \$83 billion dollars since launching the business in 2010*

**TORONTO (May 24, 2017)**—Aon plc (NYSE:AON) today announced it has reached more than \$100 billion (USD) in worldwide assets under management<sup>1</sup> (AUM) for its delegated investment solutions clients across 10 countries. Aon's Investment business now advises on \$4.2 trillion<sup>2</sup> of assets globally for more than 2,500 clients around the world.

Cary Grace, global CEO of Retirement & Investment at Aon, said: "As markets become more complex, organizations around the world are searching for a deeper level of expertise and more sophisticated investment strategies to manage their assets most effectively. Aon's growth can be attributed to our strong reputation as the predominant retirement plan advisor in the world, as well as our ability to customize solutions to serve the diverse needs of plans of all sizes, including full and partial delegation of authority. We will continue to invest in people and resources to enhance our capabilities in this important area, including expanding our solutions to asset owners outside of retirement plans—which we see is a large growth area for the future."

Globally, Aon's Delegated Investment Solutions business manages assets for more than 300 clients, representing more than 400 plans. Approximately \$30 billion in assets are managed through partial delegation—or delegating a portion of a total plan or fund—and the remaining assets are managed through full delegation of the plan.

### North America Highlights

In North America, Aon's total assets under management have grown to \$82.9 billion dollars since the business was launched in 2010.

In the U.S., Aon's U.S. registrant, Aon Hewitt Investment Consulting, Inc. ("AHIC") has added \$37 billion in AUM from 2013 to 2016—more than any other OCIO provider during that timeframe, according to Pensions & Investments.<sup>3</sup>

"Many U.S. retirement plan sponsors are not in the investment business, and as the industry faces increasingly strict regulations, delegating investment management responsibilities to a full-time investment advisor may provide greater specialization and often provide better outcomes," said Steve Cummings, head of North America Investments at Aon. "In addition to the scale and expertise Aon investment experts bring, our business model has no financial incentive to include or exclude any particular investment manager, and we don't collect management fees from investment managers. This is particularly attractive to plan sponsors looking for independence and objective plan management."

In Canada, Aon's Delegated business provided through Aon Hewitt Investment Management, has grown at a compound annual growth rate of 65 percent, making it the fastest growing country within Aon's investment business.

"The factors driving the growth of Aon's Investment Solutions Business in Canada are a function of both the increased breadth of our services and the evolving demands of pension plan sponsors," said Chris Kautzky, Managing Director, Aon Hewitt Investment Management Inc. in Canada. "Our Canadian clients are looking for tailored dynamic risk management strategies as well as improved asset class and portfolio diversification, and our business model delivers the crucial benefits of scale and transparency. Simply put, plan sponsors want better outcomes, at lower cost with faster execution, and, maybe most importantly, our solutions let them focus more on their core business objectives."

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### Footnotes:

- 1 As 3/31/17, \$100 B in global assets under management advised by AHIC (\$77 B) and its global advisory affiliates.
- 2 As 6/30/16, assets under advisement represents \$84.7 B in global discretionary assets under management and \$4.117 T in global non-discretionary assets advised by AHIC and its global affiliates which includes retainer clients and clients in which AHIC and its global affiliates have performed project services for over the past three years.
- 3 Pension & Investments, 2016 Investment Management Consultant Survey, U.S. Institutional Tax-Exempt Assets, 104 consulting firms participated in the survey. The rankings are based on the industry data reported by Pensions & Investments as of 6/30/2016. The rankings are based on the assets under advisement reported by each advisor who supplied data to Pensions & Investments. The survey does not report on any undisclosed facts about any of the advisors who participated in the survey that could call into question the validity of the underlying data. The survey does not state or imply that the rankings represent the quality of advice provided by any advisor who participated in the survey. The survey discloses the complete list of advisors who participated in the survey. The data may not represent any one client's experience because the data reflects the cumulative asset growth across the entire sampling of the clients of each advisor who participated in the survey. The data is not indicative of the future performance of advisors who participated in the survey. The survey was conducted by Pensions & Investments. No advisor paid a fee to participate in the survey.

### About Aon

Aon plc (NYSE:AON) is a leading global professional services firm providing a broad range of risk, retirement and health solutions. Our 50,000 colleagues in 120 countries empower results for clients by using proprietary data and analytics to deliver insights that reduce volatility and improve performance.

Aon Hewitt Investment Consulting, Inc. is a federally registered investment advisor with the U.S. Securities and Exchange Commission. AHIC is also registered with the Commodity Futures Trading Commission as a commodity pool operator and a commodity trading advisor, and is a member of the National Futures Association. The AHIC ADV Form Part 2A disclosure statement is available upon written request.

### About Aon Hewitt Investment Management Inc.

Aon Hewitt Investment Management Inc. ("AHIM") is a wholly owned subsidiary of Aon Hewitt Inc., and is registered as a portfolio manager, exempt market dealer and investment fund manager in Ontario and applicable provinces where it serves clients. AHIM is also the investment fund manager of the Aon Hewitt Pooled Funds and provides investment management services exclusively to Canadian institutional investors. AHIM is backed by the global scale and financial strength of Aon plc, a professional services firm and public company trading on the NYSE under the symbol "AON".

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