EDITOR'S NOTE

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As I'm writing this Editor's Note, we are consumed by information concerning the coronavirus and related market volatility. Investments & Wealth Institute provides resources that may help you during these unsettled times. You'll find "Navigating Turbulent Times" on the Institute's website (www.investmentsandwealth.org).

At *Investments & Wealth Monitor* (*I&WM*), our content focuses on helping you help clients with the fundamentals and intricacies of investing, when the markets are calmer or more turbulent. This issue covers institutional investors; past issues have addressed high-net-worth and ultra-high-net-worth clients. We also have covered such diverse topics as behavioral finance and asset allocation, which may offer insights for dealing with your clients in these volatile times.

This particular issue spotlights institutional consulting and the issues and opportunities for those who serve institutions. In addition to addressing industry trends and investing solutions, we wanted to provide a practitioner perspective to dealing with institutions.

We begin with a profile of Scott Thayer, former chair of the Investments & Wealth Institute board of directors and architect of the Institute's new Endowments & Foundations (E&F) Consulting course. Scott shares his journey from teacher to advisor, and his focus on E&Fs throughout his career. The Institute's current chair, Todd Wagenberg, and Chad Petherick offer their perspectives on "The Educated Trustee"; and Margaret Towle, former chair of the *I&WM* editorial advisory board and former editor-in-chief of the *Journal of Investment Consulting*, delves into "Environmental, Social, and Governance Investing: Myths versus Reality."

Julie Gorte and Melissa Platner share their insights in "The Institutional Market Meets Environmental, Social, and Governance Investing." Theodore Enders tackles the mutual fund versus exchange-traded fund debate with his article, "The Empirical Strikes Back: A Pragmatic Framework for Selecting Investment Vehicles." Wes Mathews discusses "Defined Outcome Investing with Exchange-Traded Funds."

To help frame the economic backdrop, Jack Tamposi offers his perspective on "Institutional Investors Re-Direct Risk Budgets." We delve into the OCIO market with Charles Skorina's article, "Outsourced Chief Investment Officer Growth in 2019: The Trillion-Dollar Slowdown."

We close with Kevin Shields' "Qualified Opportunity Zone Funds," and Judy Benson's terrific book review of *The Future of Investment Management* by Ronald Kahn.

Feel free to review the *I&WM* archives or suggest future topics. *I&WM* Managing Editor Debbie Nochlin and I always welcome your input.

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