

Meketa Investment Group Announces Adoption of the CFA Institute Diversity, Equity and Inclusion Code

BOSTON, August 30, 2022 – Meketa Investment Group (Meketa), a global investment consulting and fiduciary management (OCIO) firm, today announced it has adopted the voluntary CFA Institute Diversity, Equity and Inclusion Code for Investment Professionals in the United States and Canada (“DEI Code”), effective August 1, 2022.

Launched in February 2022, the DEI Code provides investment industry organizations with an action-oriented and principles-based framework through which to drive measurable and meaningful change concerning diversity, equity and inclusion within organizations. As a baseline, signatories must, within two years, adopt a DEI policy and statement, establish a senior leadership ownership and oversight governance process, and implement a plan to integrate DEI within the organization’s people, processes and policies. Signatories also commit to six principles that seek to drive DEI progress as it relates to the talent pipeline, staff acquisition, promotion and retention, leadership, influence, and measurement. Further, signatories pledge to accelerate and amplify the impact of their commitment by making the economic, business, and moral case for diversity, equity, and inclusion.

“From expanding the diverse talent pipeline, to fostering equitable promotion and retention, to improving DEI outcomes, Meketa has long embraced the tenets and goals of the DEI Code,” said Stephen McCourt, co-CEO, Meketa Investment Group. “In becoming a signatory, we are further affirming Meketa’s commitment to foster and promote DEI in all its forms in our organization, in the investment industry and in society at large.”

“We applaud the CFA Institute for establishing the DEI Code and for their ongoing efforts to broaden inclusion in the investment industry, with the goal of creating better working environments and better investment outcomes,” said Peter Woolley, co-CEO, Meketa Investment Group. “We are very pleased to join in this worthwhile effort, which we believe will position Meketa to even more effectively drive the change to an equitable future.”

“In working together to improve diversity, equity and inclusion in the investment industry, signatory organizations are making clear their public commitment to delivering on the work and change needed to participate meaningfully in this effort,” said Sarah Maynard, ASIP, Global Head of External Diversity, Equity & Inclusion, CFA Institute. “I’m delighted to welcome Meketa to the growing number of organizations committed to the principles of the DEI Code.”

For more information on the DEI Code, please visit <https://www.cfainstitute.org/en/ethics-standards/codes/diversity-equity-inclusion>

About Meketa

Founded in 1978, Meketa is an employee-owned, full-service investment consulting and fiduciary management (OCIO) firm. As an independent fiduciary, the firm serves institutional investors in non-discretionary and discretionary capacities. Meketa’s collective client assets under advisement represent approximately \$1.9 trillion as of March 31, 2022. For more information, please visit www.meketa.com.

About CFA Institute

CFA Institute is the global association of investment professionals that sets the standard for professional excellence and credentials. The organization is a champion of ethical behavior in investment markets and a respected source of knowledge in the global financial community. Our aim is to create an environment where investors’ interests come first, markets function at their best, and economics grow. There are more than 190,000 CFA charterholders worldwide in more than 160 markets. CFA Institute has nine offices



worldwide and 160 local societies. For more information, visit www.cfainstitute.org or follow us on LinkedIn and Twitter at @CFAINstitute

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