

Meketa Investment Group Expands Employee Ownership Team

BOSTON, March 6, 2024 – Meketa Investment Group (“Meketa”), a global investment consulting and fiduciary management (OCIO) firm, today announced it has expanded its employee ownership to include two new shareholders. Principals Stephanie Sorg and Zack Driscoll have joined the firm’s ownership group, bringing the employee ownership of the firm to more than 70 shareholders.

“Meketa is a people-first organization and our employee ownership is a testament to our commitment to not only recognize but also reward the hard work, dedication, and innovation our team continues to bring to the table every day. As we continue to grow and evolve, our employees remain our most valuable asset,” said Stephen McCourt, Managing Principal and Co-Chief Executive Officer, Meketa.

“Last year provided an incredible opportunity for us to continue connecting with clients and offering our hand in partnership. Our success is directly linked to our clients entrusting us with the stewardship of their assets. I am incredibly optimistic about what Meketa and our clients can accomplish as we continue to focus on helping them achieve their long-term financial goals,” said Peter Woolley, Managing Principal and Co-Chief Executive Officer, Meketa.

New Meketa Shareholders

Stephanie Sorg, CAIA, serves as a consultant working with a variety of defined benefit, defined contribution, and endowment and foundation clients. Stephanie is a CAIA Charterholder and an Executive Board Member of the CAIA’s Southwest chapter. She received bachelor’s and master’s degrees in Finance from Santa Clara University.

Zack Driscoll, CFA, serves as a research consultant specializing in marketable alternatives (hedge funds). Zack is a member of Meketa’s Corporate Responsibility Committee, Emerging and Diverse Manager Committee, and Marketable Securities Oversight Committee. He is a CFA Charterholder and received a Bachelor of Business Administration from Villanova University.

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 nondiscretionary and discretionary capacities. Meketa’s collective client assets under advisement represent approximately \$1.8 trillion as of September 30, 2023. For more information, please visit www.meketa.com.

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