



## CBIZ Investment Advisory Services Named #3 on Barron's List of Top 100 Institutional Consulting Teams

April 25, 2023

*The annual list highlights the top investment management providers that serve large organizations*

CLEVELAND--(BUSINESS WIRE)--Apr. 25, 2023-- CBIZ, Inc. (NYSE: CBZ) today announced that CBIZ Investment Advisory Services, LLC ("CBIZ IAS") has been ranked third on Barron's Top 100 Institutional Consulting Teams list. This marks the fourth consecutive year CBIZ IAS has made the list and the 2023 ranking increased a position higher from its placement in 2022.

The 2023 Top 100 Institutional Consulting Teams is an annual listing of the nation's top investment management teams that specialize in providing services for large corporations, including pension funds and university endowments. These teams also serve individual investors, many of whom seek institutional-style oversight of their investments. Barron's rankings serve as an industry scorecard and are based on a 102-question survey that is verified using regulatory databases and then based on a ranking formula based on assets, revenue and quality of practice. More detailed information on the methodology can be found on Barron's [website](#).

"I am proud of our institutional consulting team. They continually strive to deliver consistent results to clients and help them navigate the economic and investment challenges of the day," said Brian Dean, President, CBIZ Investment Advisory Services. "This recognition by Barron's highlights our ability to meet and exceed fiduciary responsibilities and serve our valued clients."

CBIZ IAS is comprised of 66 consultants and 18 analysts who manage more than \$58 billion dollars in institutional consulting assets and serve more than 1,700 clients.\* In addition to President Brian Dean, the team is led by Chief Investment Officer Anna Rathbun and Lead Portfolio Strategist Dede Kalt.

\*Please see the Form ADV for CBIZ Investment Advisory Services, LLC, a registered investment adviser, at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### About CBIZ

CBIZ, Inc. is a leading provider of financial, insurance and advisory services to businesses throughout the United States. Financial services include accounting, tax, government health care consulting, transaction advisory, risk advisory, investment advisory, and valuation services. Insurance services include employee benefits consulting, retirement plan consulting, property and casualty insurance, payroll, and human capital consulting. With more than 120 Company offices in 32 states, CBIZ is one of the largest accounting and insurance brokerage providers in the U.S. For more information, visit [www.cbiz.com](http://www.cbiz.com).

Investment advisory services provided through CBIZ Investment Advisory Services, LLC, a registered investment adviser and a wholly owned subsidiary of CBIZ, Inc.

The rankings for Barron's Top Institutional Consulting Teams are compiled based on a set of data supplied by the advisers. Barron's verifies this data and applies their rankings formula to generate a ranking based on assets, revenue, and quality of practice.

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