William Blair

Investment Management
im.williamblair.com

A Trusted Advisor to Taft-Hartley Plans

William Blair is dedicated to helping Taft-Hartley funds and, ultimately, plan members achieve their investment objectives. We oversee more than $3.0 billion[1] of Taft-Hartley assets. We provide dedicated client service and portfolio management expertise across U.S. equity, non-U.S. equity, and emerging markets debt strategies. We have included some useful information below:

William Blair is a Chicago-based, 100% active employee-owned investment firm founded by William McCormick Blair in 1935. Our core strengths are:

Commitment to Clients

William Blair's professionals strive to meet and exceed client expectations every day. Since 1935, our commitment to clients has been embodied by our founder's credo: "When our clients succeed, the firm's success will follow."

Stability and Consistency

With long-tenured portfolio managers and research analysts, our portfolios have been managed by stable investment teams, providing for consistent application of our time-tested investment philosophies.

Trusted Experience

We understand the investment objectives of labor and management trustees, as well as members, administrators, and consultants. Our long-term performance results are driven by a passion for and dedication to intensive fundamental research. This rigorous, collaborative process leverages the intellectual capital of our investment teams, allowing us to offer a wide range of investment solutions to meet client needs and support fair labor practice and job creation. We take pride in the depth of our knowledge and acuity of our insight.

Firm Statistics

(as of 6/30/26)

$71.7 billion[1]
Total assets under management

2,113
Employees (311 in Investment Management)

233 partners
44 in Investment Management

97
Investment professionals

29
Portfolio managers

50
Dedicated Investment Management analysts

26 years
Average industry experience for portfolio managers

1 As of 6/30/26; includes separate accounts and commingled assets. Total assets and total strategy assets are inclusive of total discretionary assets under management (AUM) as well as non-discretionary assets under advisement (AUA), as indicated. AUA generally consists of non-discretionary advisory assets managed by third parties in accordance with investment model portfolios provided by William Blair Investment Management, LLC (William Blair). William Blair receives an asset-based fee on AUA but does not exercise investment discretion or trading authority over such assets. All AUA data is reported on a one-month lag. William Blair's measure of AUM/AUA for these purposes may differ from the calculations employed by other investment managers and, as a result, may not be directly comparable. This measure also differs from the manner in which William Blair is required to report assets under management in certain regulatory filings.

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