

Gained Clients

Start Date	Client Name
2008	CIR/SEIU Benefits Fund
2008	Kern Co. IBEW Electrical Workers Pension Trust
2008	Pipefitters Local No. 537
2008	Line Construction Retiree Benefit Fund
2008	IBEW Local 9/Outside Contractors Health & Welfare Fund
2008	UFCW Unions & Employers Midwest Health Fund
2008	SEIU Healthcare IL Home Care & Child Care Fund
2008	Sheet Metal Workers No. 17 Apprenticeship & Training
2008	Northern CA Glaziers
2008	UFCW Local 655 Food Employers Jt Pension Trust
2008	Southern California IBEW-NECA Defined Contribution Plan
2009	Southern California IBEW-NECA Health Trust Fund
2009	Omaha Construction Industry Health/Welfare Plan
2009	Communications Workers of America
2009	Massachusetts Bay Transportation Authority Retirement Fund
2009	Bricklayers & Allied Craftworkers Health Fund
2009	Truck Drivers & Helpers Local Union 355 Health & Welfare Fund
2009	United Food and Commercial Workers Unions and Employers Pension Plan (of WI)
2010	Ironworkers Local 473 Pension Trust
2010	UFCW 655 Health & Welfare Plan
2010	American Postal Workers Union Hallbeck Scholarship Fund and Union STIF Fund
2011	ILA Local No. 1414
2011	SEIU Operating Funds
2011	Communication Workers of America 401(k) Plan
2011	IUE-CWA GM Bankruptcy Claim Trust
2012	Western Glazier Retirement Trust
2012	National Electrical 401(k) Staff Plan
2012	NAGE/SEIU Local 5000 Trial Court of MA Health and Welfare Fund
2013	Fox Valley & Vicinity Construction Workers Pension and Welfare Funds
2013	Plumbers & Steamfitters Local 267 Pension, Annuity, and Insurance Funds
2013	Boilermakers-Blacksmith National Pension Fund

Client Losses

Terminated Clients

End Date	Client Name	Reason for Termination
2011	Teamsters Local 705 Pension/Health & Welfare Fund	Consultant departure-Client chose to follow

Failed to Meet MCG's Minimum Fee Requirements

A number of MCG's smaller clients were unable to meet our minimum fee requirements

End Date	Client Name
2010	Michigan BAC Pension, Apprenticeship/Training and Health Care Fund
2010	Motion Picture Machine Operators #306 Pension
2010	NECA-IBEW 480 Pension
2010	Plumbers & Steamfitters 102 Pension Trust
2010	Upstate New York Bakery Drivers and Industry Pension Fund
2011	Northern Nevada Laborers
2012	Chicago Truck Drivers, Helpers and Warehouse Workers
2012	Rodman Local Union 201 Pension Fund
2012	Transport Workers – Westchester Private Bus Pension
2013	Plumbers & Pipefitters Local 333 Pension Fund

Merged Clients

In the following instances client plans merged into larger plans and ceased their relationship with MCG

Merger Date	Client Name
2012	Line Construction Retiree Benefit Fund
2012	Iron Workers Local 473 Pension Fund
2012	Milwaukee Brewery Workers Pension Plan
2013	Northern California Glaziers Individual Account Retirement Plan Trust Fund

Outsourced Fund Management

The following plans converted to a discretionary/manager of manager relationship with another firm.

End Date	Client Name
2011	HERE Local 25 Pension Fund
2012	Western Independent Shops Pension Trust

Consultant Departure

In 2011 Ian Jones resigned from MCG. Of his 20 client relationships, 4 chose to leave MCG.

End Date	Client Name
2011	UNITE HERE Funds
2011	Graphic Communications Conference of the IBT National Pension Plan
2011	Transit Employees' Retirement Plan
2011	Buffalo Laborers' Pension Fund