

NEWS RELEASE

## Global Policy Advisors Releases Roadmap for Establishing a U.S. Sovereign Wealth Fund

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WILMINGTON, Del., Sept. 26, 2024 (GLOBE NEWSWIRE) -- Global Policy Advisors LLC, a specialized sovereign wealth fund advisory, has published a detailed briefing outlining the potential for the United States to establish a Sovereign Wealth Fund (SWF). The report, titled *A Roadmap for Establishing a U.S. Sovereign Wealth Fund: Strategic Considerations and Governance*, provides an in-depth examination of the key factors involved in developing a U.S. SWF, addressing the implications for policymakers, financial market participants, and other stakeholders.

The briefing covers essential areas of consideration, including the potential types of SWFs suited for the United States, governance structures, the role of external investment managers, asset class allocations, and the political dynamics that would shape the fund's creation and management. It also explores how financial institutions like Goldman Sachs, JP Morgan, Citadel, Lazard, and specific hedge fund and private equity firms may serve as derivative beneficiaries of the SWF's investment activities.

"This report serves as a comprehensive guide for those evaluating the complex decision-making processes surrounding the potential establishment of a U.S. sovereign wealth fund," said Salar Ghahramani, the executive director of Global Policy Advisors. "It offers a structured framework for navigating the multi-faceted implications and provides insights for both public policymakers and market participants."

Highlights of the briefing include:

- A review of SWF types, including stabilization, development, and pension reserve funds.
- Analysis of governance models and institutional reporting structures, focusing on oversight mechanisms and transparency.

- Examination of the potential role of external investment managers, including U.S.-based firms like BlackRock, Vanguard, Apollo Global Management, and Citadel.
- Discussion of the political considerations that may exclude non-U.S. investment managers and firms from participation.
- A look at the derivative beneficiaries of SWF activities, including major U.S. financial institutions.
- A projection that the U.S. may eventually establish multiple SWFs to address various economic needs.

The report presents an objective framework for assessing the feasibility and potential impact of a U.S. SWF, without advocating for or against its creation. A summary of the report and the instructions for accessing the full report are available on GPA's **website**.

#### About Global Policy Advisors

Global Policy Advisors® LLC is a boutique sovereign wealth fund advisory and consultancy to corporations, boards of directors, and institutional investors — including hedge funds, public pension funds, and SWFs. GPA provides research and advisory services in the intersection of law, policy, and finance, with a focus on governance, international and regulatory affairs, and public policy insights.

To learn more, contact Global Policy Advisors at:  
Email: [inquiries@globalpolicyadvisors.com](mailto:inquiries@globalpolicyadvisors.com)  
Website: <https://www.globalpolicyadvisors.com/>

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