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**Plan Sponsor Network Names CS McKee a “Top Guns Manager of the Decade”  
for 12<sup>th</sup> Consecutive Year**

**Pittsburgh, PA (June 28, 2021)** – For the 12<sup>th</sup> consecutive year, Plan Sponsor Network (PSN) has named CS McKee as one of its "Top Guns Managers of the Decade." CS McKee's most recent award is for its Aggregate Fixed Income strategy in the PSN All/Variable Maturity Universe for the 10-year period ending December 31, 2020. C.S. McKee has been named to the “Top Guns Manager of the Decade” list every year since 2009\*.

“Incorporating both fundamental and technical factors and focusing on quality, liquidity, and risk management, we believe our bottom-up research process is what significantly differentiates us from our peers,” said Mark Gensheimer, President of CS McKee. “We are proud to receive this recognition from PSN, which is a testament to our long-standing investment philosophy and process,” he added.

We are delighted to once again congratulate our CS McKee colleagues for their consistent outperformance, and gratefully acknowledge the value they have provided to our clients,” said Mark Goodwin, Co-Founder and CEO of North Square, the parent company of CS McKee. “The CS McKee portfolio management team’s disciplined and methodical security selection has enabled them to build a portfolio construction process that has proven to be repeatable over time, creating a very successful long-term track record,” he said.

CS McKee, a full-service institutional money manager, primarily specializes in a range of taxable fixed-income strategies that focus on providing institutional investors with consistent risk-adjusted performance. McKee also offers a variety of other investment strategies including domestic and international equity and balanced portfolios that are all designed to meet a client’s investment objectives and targeted levels of risk.

**About CS McKee**

CS McKee is an institutional investment management firm based in Pittsburgh, PA with approximately \$7.4 billion under management as of May 31, 2021 in taxable fixed income, equity and multi-asset portfolios. The firm was founded in 1931 and became a Registered Investment Advisor in 1972. CS McKee’s business was acquired by North Square in 2020. McKee’s clients include pension funds, profit-sharing plans, reserve funds, operating funds and other financial

assets for states, counties, municipalities, unions, financial service companies, corporations, endowments and foundations, hospitals, universities, religious organizations and other institutions. Learn more about CS McKee at [csmckee.com](http://csmckee.com).

## **About North Square**

Founded in 2018 and headquartered in Chicago, Illinois, North Square Investments is an independent, multi-boutique investment firm dedicated to delivering differentiated active investment strategies to the market. With an experienced senior management team, a board composed of industry veterans including John Amboian, Neil Cummins and Brian Gaffney, and backed by Estancia Capital Partners, North Square is a leader in aggregating high quality, alpha-generating active strategies to assist financial intermediary partners in building superior risk-adjusted portfolios for the benefit of their clients. Learn more about North Square Investments at [northsquareinvest.com](http://northsquareinvest.com).

*CS McKee and North Square Investments, LLC are investment advisers registered with the U.S. Securities and Exchange Commission. Registration does not imply a certain level of skill or training. More information about the companies' investment advisory services can be found in their respective Form ADV, which are available upon request. Past performance is not indicative of future results.*

## **About the PSN Top Guns Manager of the Decade Methodology**

The complete list of PSN Top Guns and an overview of the methodology can be located at <https://psn.fi.informais.com/>. Top Guns Manager of the Decade is a recognition from Informa Investment Solutions PSN, an independent, national money manager database. This designation may not be representative of any one clients experience because the rating reflects an average of all, or a sample of all, the experiences of CS McKee clients. This information does not reflect the experience of clients of CS McKee and is not indicative of future performance.

**Criteria:** The PSN universes were created using the information collected through the PSN investment manager questionnaire and use only gross of fee returns. Mutual fund and commingled fund products are not included in the universe. PSN Top Guns investment managers must claim that they are GIPS compliant. Products must have an r-squared of 0.80 or greater relative to the style benchmark for the ten-year period ending December 31, 2020. Moreover, products must have returns greater than the style benchmark for the ten-year period ending December 31, 2020 and also standard deviation less than the style benchmark for the ten-year period ending December 31, 2020. At this point, the top ten performers for the latest ten-year period ending December 31, 2020 become the PSN Top Guns Manager of the Decade.

*\* CS McKee was recognized in the PSN Core Fixed Income Universe from 2009-2017, the PSN All Maturity/Variable Universe in 2018 and 2020, and the PSN Intermediate Core Fixed Income Universe in 2019. The PSN Core Fixed Income Universe is comprised of the following: 2009: 206 firms and 371 products; 2010: 208 firms and 375 products; 2011: 208 firms and 392 products; 2012: 209 firms and 399 products; 2013: 207 firms and 410 products; 2014: 205 firms and 407 products; 2015: 197 firms and 399 products; 2016: 199 firms and 402 products; 2017: 196 firms and 392 products. The PSN All Maturity/Variable Universe is comprised of the following: 2018: 161 firms and 314 products; 2020: 150 firms and 303 products. The PSN Intermediate Core Fixed Income Universe is comprised*

*of the following: 2019: 128 firms and 188 products. Rankings were sourced from eVestment and are effective as of 12/31/20. The rankings may not be representative of any one client's experience because the ratings reflect an average of all, or a sample of all, of the experiences of C.S. McKee's clients. The rankings are not indicative of CS McKee's future performance.*

*This document may contain certain information that constitutes "forward-looking statements" which can be identified by the use of forward-looking terminology such as "may," "expect," "will," "hope," "forecast," "intend," "target," "believe," and/or comparable terminology. No assurance, representation, or warranty is made by any person that any of C.S. McKee and North Square's assumptions, expectations, objectives, and/or goals will be achieved. Nothing contained in this document may be relied upon as a guarantee, promise, assurance, or representation as to the future.*