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**Achieving Significant Milestones, North Square Investments  
Celebrates Third Anniversary**

**Chicago, IL (July 21, 2021)** – North Square Investments (North Square), a multi-boutique manager with a range of equity, fixed income and multi-strategy product offerings, is celebrating the third anniversary of its founding this month, having achieved a number of significant milestones including acquisitions, growth in assets under management and advisement, new product offerings and key hires.

This past June, North Square completed the acquisition of the Stadion Funds, its second major acquisition in 18 months. In March of 2020, North Square completed the acquisition of CS McKee, a full-service institutional money manager founded in 1931 and headquartered in Pittsburgh, Pennsylvania.

By the end of the second quarter, North Square had over \$1 billion of assets under management in 12 mutual funds. With North Square's ownership interests (majority and minority, respectively) in the distinctly branded firms of CS McKee (over \$7B AUM) and Oak Ridge Investments, collective assets under management and advisement totaled over \$10 billion.

"From our founding three years ago, North Square's focus has been to source, develop and deliver institutional quality, active investment products primarily for high net worth and retail investors through strong relationships with financial consultants and advisors dedicated to building better portfolios for their clients," said North Square Investments CEO and Co-Founder Mark Goodwin. "Our mutual fund and separate account strategies are being developed and offered with the objective of complementing both passive and active strategies which we believe are at the very core of well-designed portfolios," he said.

"In the past year, we have also significantly expanded our professional team, filling key positions in sales, marketing, compliance and portfolio management," Goodwin continued. "We believe we have the right people, resources, technology and subadvisory relationships in place to foster future growth and believe we will be successful as we continue to expand our multi-boutique platform and product suite."

## **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. North Square has an experienced senior management team comprised of seasoned professionals who collectively share 126 years of industry experience, a board composed of industry veterans including John Amboian, Neil Cummins and Brian Gaffney, and is backed by Estancia Capital Partners. Learn more about North Square Investments at [northsquareinvest.com](https://northsquareinvest.com).

North Square is committed to the sourcing, vetting and delivery of institutional quality, active investment managers to their financial intermediary partners which include broker dealers, wealth management advisors, RIAs, family offices, retirement plans and private banks. We believe the firm delivers value to its investment partners by providing support services and access to distribution while assisting distribution partners as they search for high quality, alpha-generating active investment strategies to build better risk-adjusted portfolios for their clients.

*North Square Investments, LLC is an investment adviser registered with the U.S. Securities and Exchange Commission. Registration does not imply a certain level of skill or training. More information about the company's investment advisory services can be found in its Form ADV, which is available upon request. Past performance is not indicative of future results. Nothing contained herein constitutes an offer to buy or sell a particular security or investment product. This information contains opinions that are as of the date of this publication and are subject to change without notice.*