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**David Appleby Joins CS McKee as Vice President - Risk, Quantitative Analysis and Portfolio Construction**

**Pittsburgh, PA (February 15, 2022)** – CS McKee today announced that David Appleby has joined its investment team as Vice President - Risk, Quantitative Analysis and Portfolio Construction. This newly created position is designed to provide additional analysis and support to the team managing CS McKee’s growing suite of equity, fixed income and multi-asset portfolios. The announcement was made by Mark Gensheimer, President of CS McKee, who said that David will report to Brad Thompson, Director of Multi-Asset Class solutions for the firm.

“David’s background in risk management and performance analysis will be an asset to the portfolio management team,” Thompson said. “With his knowledge, experience and skill set, we are confident David will make a significant contribution to CS McKee’s investment capabilities,” he said.

“We are thrilled to have David join CS McKee and augment a very talented group of professionals,” Gensheimer said. “This hire demonstrates that we will continue to add to our professional staff as needed to support the ongoing growth and diversity of our business,” he added.

Prior to joining CS McKee, Appleby held senior risk management positions, most recently at North Square Investments and Oak Ridge Investments, where he began his career in the investment industry in 2006.

Appleby is a graduate of the University of Georgia with a bachelor’s degree in Economics. He received a master’s degree in Finance from the Illinois Institute of Technology and also holds the FRM® (Financial Risk Management) Certification.

**About CS McKee**

CS McKee is an institutional investment management firm based in Pittsburgh, PA with over \$9.9 billion under management as of December 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. North Square has an experienced senior management team comprised of seasoned professionals, a board composed of industry veterans including John Amboian, Neil Cummins and Brian Gaffney, and is backed by Estancia Capital Partners. As of December 31, 2021, North Square had over \$1.2 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 and Oak Ridge Investments, collective assets under management and advisement totaled over \$12 billion. Learn more about North Square Investments at [northsquareinvest.com](http://northsquareinvest.com).

**Before investing you should carefully consider the Fund's investment objectives, risks, charges and expenses. This and other information is in the prospectus, a copy of which must accompany precede this commentary. Please read the prospectus carefully before you invest.**

*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.*