



Media Contact:

Martin Gawne

(312) 857-2167

mgawne@northsquareinvest.com

Ryan Fero Joins North Square Investments as Internal Sales Consultant

Chicago, IL (August 8, 2023) – North Square Investments today announced that Ryan Fero had joined the firm as an internal sales consultant, supporting Northeast Regional Director Brendan Kinnarney and Southeast Regional Director John Fitzgibbons. The announcement was made by Senior Managing Director and Head of Distribution Phil Callahan, who said Ryan will report to North Square Vice President and Manager of Internal Sales Brent Troy.

“We are extremely pleased that Ryan has joined North Square as part of our ongoing efforts to provide the highest levels of advisor support,” Callahan said. “Ryan will be working very closely with Brendan and John to provide immediate and responsive internal assistance for all marketing and service inquiries going forward.”

Ryan joins North Square after spending four years working for the Capital Group in Indianapolis in several different internal sales roles, including Internal Wealth Generalist and Sales Support Coordinator. In both of these roles, Ryan worked with external advisors to support the sale of Capital Group’s retail mutual fund family, the American Funds.

Prior to joining Capital Group, Ryan was a golf professional at Crooked Stick Golf Club in Carmel, Indiana. He obtained his undergraduate business degree with a major in Finance from Coastal Carolina University, earning Dean’s List honors for multiple semesters. Ryan holds FINRA Series 7 and 66 licenses and currently holds the Certified Investment Management Analyst (CIMA) designation.

“As we continue to build our firm and expand our investment capabilities, we are delighted to that Ryan has joined North Square,” said North Square CEO and co-founder Mark Goodwin. “With his excellent background and experience, communication skills, investment knowledge and financial proficiency, we are confident Ryan will be an outstanding addition to our team.”

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. 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. As of June 30, 2023, North Square had \$1.3 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 (approximately \$8.1B AUM) and Oak Ridge Investments (over \$1.3B AUA), collective assets under management and advisement totaled \$10.7 billion.

About North Square

Founded in 2018 and headquartered in Chicago, IL, 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 best-in-class active managers and delivering select, in-demand investment strategies to financial intermediary partners for the benefit of their clients. Learn more about North Square Investments at northsquareinvest.com.