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Isaac Green Joins North Square Investments as Vice President, Regional Director

Chicago, IL (January 10, 2024) – North Square Investments today announced that Isaac Green had joined the firm as a vice president and regional director. The announcement was made by CEO Mark Goodwin, who said Isaac will report to Head of Distribution Phil Callahan.

“Isaac is an investment management sales professional with extensive experience in multi-channel sales and relationship management,” Goodwin said. “As we continue to build North Square, expanding our investment capabilities and product offerings, we are very pleased to have someone with Isaac’s background, experience and established relationships join our firm,” he said. “We know Isaac will be an outstanding addition to our team.”

“Isaac joins us with a proven background building territories from scratch into leading sales regions at his prior firms,” Callahan said. “Throughout his career Isaac has worked with Registered Investment Advisors (RIAs), broker-dealers, and private wealth advisory teams and he joins North Square with an extensive network on the west coast.”

Isaac will be responsible for partnering with financial intermediaries including broker dealer advisors, RIAs and private wealth managers in North Square’s West Region. “We are very excited to have Isaac join our firm to extend our outreach into these important channels, where he will be an excellent resource to our financial intermediary partners,” Callahan added.

Previously, Isaac was a Senior Vice President with ROBO Global ETFs, responsible for all-channel distribution on the west coast while providing key account and marketing support as well. Prior to ROBO, Isaac was a Managing Director for Pacer Financial where he built a completely new territory for the firm in northern California, northern Nevada and Hawaii. Isaac spent seven years with Fidelity Investments where he held a number of positions of increasing responsibility including Tax-Exempt Retirement Planner, CRPC®, Retirement Solutions and Investment Solutions Representative Team Lead, as well as Premium Relationship Associate Team Lead. Isaac started his career as a Financial Representative with Northwestern Mutual.

Isaac holds a Bachelor of Science in Finance Degree from Westminster College in Utah and holds FINRA Series 7 and Series 66 licenses.

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. At this time, North Square’s multi-boutique platform includes a mutual fund family and ownership interests in the distinctly branded

firms of CS McKee and Oak Ridge Investments with collective assets under management and advisement of approximately \$11.1 billion as of December 31, 2023.

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.

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