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**North Square Investments Acquires Patterson Capital Corporation  
Through Its CS McKee Affiliate**

**Chicago, IL (April 1, 2024)** – North Square Investments announced it has completed the acquisition of Patterson Capital Corporation, an independently owned fixed income investment adviser in Los Angeles, California, through its majority-owned affiliate CS McKee. The announcement was made by Mark Goodwin, the Co-Founder and CEO of North Square Investments, who said Patterson Capital will be merged into CS McKee.

Patterson Capital offers several high-quality fixed income strategies and works with clients in the development of investment guidelines and custom benchmarks for unique investment goals. The firm has provided dedicated services to a wide range of clientele including corporate pension and Taft-Hartley plans, healthcare and insurance companies, public plans and funds and non-profit organizations.

“Patterson Capital’s outstanding reputation as a high-quality fixed income investment manager complements North Square’s existing business and will be accretive to CS McKee’s respective goals for growth” said Mark Goodwin, Co-Founder and CEO of North Square. The acquisition is expected to add more than \$1 billion to CS McKee’s assets under management.

“We are delighted to join CS McKee, a high quality and very-well regarded institutional money manager,” said Joseph Patterson, President and Chief Investment Officer of Patterson Capital, and we are excited about this next chapter of our firm’s evolution as we become part of CS McKee.”

“For more than 47 years Patterson Capital has been dedicated to providing its clients with superior service and exceptional performance,” said Mark Gensheimer, President of CS McKee. “Our two firms share similar investment philosophies, and we believe Patterson Capital’s investment strategies will be an excellent complement to CS McKee’s taxable fixed income, equity and multi-asset portfolios,” Gensheimer said.

“Also worth noting is that CS McKee Chief Investment Officer and Portfolio Manager Brian Allen is a former Patterson Capital Portfolio Manager, where he actively managed approximately \$800 million in intermediate and long maturity institutional funds,” Gensheimer added.

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. North Square believes it 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’s multi-boutique platform includes a mutual fund family and ownership interests in the distinctly branded firms of C.S. McKee and Oak Ridge Investments with collective assets under management and advisement of over \$12 billion on a proforma basis following the Patterson acquisition.

### **About CS McKee**

CS McKee is an institutional investment management firm based in Pittsburgh, PA with over \$8.30 billion under management as of December 31, 2023 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](https://www.csmckee.com).

### **About Patterson Capital Corporation**

Patterson Capital is an independently owned investment adviser in Los Angeles, California that focuses exclusively on management of fixed income portfolios for institutional clients. An SEC registered investment company, Patterson Capital was established in 1977. Its senior executive team has been in place since the mid-eighties providing clients with continuity of investment style, staff and service. Learn more about Patterson Capital at [pattersoncapital.com](https://www.pattersoncapital.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, 2023, North Square had \$1.39 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 \$11.1 billion. Learn more about North Square Investments at [northsquareinvest.com](https://northsquareinvest.com).

CS McKee, Patterson Capital and North Square are independent investment advisers registered under the Investment Advisers Act of 1940, as amended. Registration does not imply a certain level of skill or training, nor approval by the SEC.

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