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North Square Again Named One of Chicago's 25 Largest Money Managers

Chicago, IL (April 17, 2024) – North Square Investments has again been named to Crain's Chicago Business' list of 25 largest money managers, ranking 25th by total assets of \$11.1 billion under management (AUM) as of December 31, 2023, according to *Crain's Chicago Business*.

The year 2023 marked the fifth anniversary of North Square Investment's founding and the third year on Crain's list.

"We are delighted to once again be included among this list of very distinguished investment managers," said North Square Investments CEO and Co-Founder Mark Goodwin. "North Square experienced an 8.7% increase in assets under management, boosted by our fourth consecutive year of positive and growing retail flows," he said.

"During 2023 we continued to focus on initiatives to grow and diversify our business, including enhancing our product set, adding key members to our team and expanding our distribution relationships," Goodwin continued. "And yet as we moved forward with these important initiatives, I am proud and grateful that our North Square and CS McKee colleagues continued to give back to the community with volunteer work and charity engagement. We look forward to continuing to build and expand our multi-boutique platform and product suite, because we are confident we have the right people, resources, technology and subadvisory relationships in place to foster future growth," he said.

To view Crain's Chicago Business' list of Chicago's largest 25 money managers, please click [here](#).

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. North Square, through its multi-boutique platform, has \$1.47 billion of assets under management in mutual funds. North Square also has ownership interests (majority and minority, respectively) in the distinctly branded firms of CS McKee (approximately \$9.18B AUM) and Oak Ridge Investments (\$1.61B AUA) with collective assets under management and advisement, together

with North Square, of \$12.26 billion as of March 31, 2024. Learn more about North Square Investments at northsquareinvest.com.

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. 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.

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