



Media Contact:

Martin Gawne

(312) 857-2167

mgawne@northsquareinvest.com

North Square Investments Named a 2024 Money Management Institute/Barron's Industry Awards Finalist

Chicago, IL (July 30, 2024) – North Square Investments (North Square), a multi-boutique manager with a range of product offerings, has been named as a finalist for the 2024 Money Management Institute/Barron's Industry Awards.

North Square was named as a finalist in the “Asset Manager of the Year – AUM of Less than \$25 Billion” category, which honors a smaller asset manager that exemplifies innovation in delivering better outcomes for investors and financial advisors.

“We feel extremely honored to be announced as a finalist for this award,” said North Square CEO and co-founder Mark Goodwin. “From our founding six years ago our focus has been to source, develop and deliver institutional quality, active investment products primarily for high net worth and retail investors through strong relationships with financial consultants and advisors dedicated to building better portfolios for their clients. Our mutual fund and separate account strategies are being carefully and thoughtfully curated to offer an array of traditional and alternative strategies—including income solutions and niche categories—to serve as building blocks for our wealth management partner firms as they implement portfolio solutions for their clients,” Goodwin said.

“We believe we have the right people, resources, technology and subadvisory relationships in place to foster future growth and believe we will be successful as we continue to expand our multi-boutique platform and product suite. And we are very grateful to all our North Square colleagues, subadvisors, distribution partners, financial advisors and investors who have placed their trust in us,” he added.

Learn more about the Money Management Institute/Barron's Industry Awards here: <https://www.mminst.org/2024-industry-awards-finalists>

North Square is committed to the sourcing, vetting and delivery of institutional, 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 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. 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 approximately \$12.5 billion (as of June 30, 2024).

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. With an experienced senior management team, a board composed of highly regarded industry veterans and backed by Estancia Capital Partners, North Square is a leader in aggregating high quality, alpha-generating active strategies to assist financial intermediary partners in building risk-adjusted portfolios for the benefit of their clients. 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. Past performance is not indicative of future results.

###