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**Steve Gongola Joins North Square Investments as Vice President, Regional Director**

Chicago, IL (November 12, 2024) – North Square Investments today announced that Steve Gongola had joined the firm as a vice president and regional director. The announcement was made by CEO Mark Goodwin, who said Steve will report to Head of Distribution Phil Callahan.

Steve will be responsible for sales and asset retention, partnering with financial intermediaries including broker dealers, RIAs, banks, retirement plan providers and consultants, and private wealth managers in North Square’s Midwest Region, Callahan noted, and said Steve will be based in the Chicago area.

“Steve has had great success representing mutual funds, Separately Managed Accounts (SMAs), Real Estate Investment Trusts (REITs), Private Equity and Exchange Traded Funds (ETFs) while covering most financial intermediary channels including independent broker dealers, wirehouses, Registered Investment Advisors (RIAs) and retirement plan advisors and consultants,” Callahan said. “We are very fortunate to have someone of Steve’s caliber join our team, where he will be an excellent resource to our distribution partners,” Callahan added.

“As the growth trajectory of our firm continues, expanding our investment capabilities and product offerings, we are very pleased to have someone with Steve’s background, track record and established relationships join our firm,” Goodwin said. “With the extensive experience and client relationship skills Steve brings to North Square, we are confident he will be an outstanding addition to our firm.”

Most recently, Steve was a regional vice president with American Century Investments, also based in Chicago, where he was responsible for sales of the firm’s mutual funds, SMAs and ETFs in the RIA, broker-dealer and wirehouse channels.

Previously, he was a regional vice president with KBS Capital Markets Group, sourcing capital for REITs and Private Equity portfolios across independent broker dealers and RIAs in Wisconsin, Indiana and Illinois. Prior to that Steve held positions with Innealta Capital, Tricone Pacific Capital Partners and Prudential, starting his career in the investment industry as a regional consultant with Goldman Sachs.

Steve received a Bachelor’s Degree in Finance from Miami University in Oxford, Ohio and holds FINRA Series 6, 7, 63 and 65 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. 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 \$12.7 billion (as of September 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 superior risk-adjusted portfolios for the benefit of their clients. Learn more about North Square Investments at [northsquareinvest.com](https://northsquareinvest.com).

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