



ASSET
MANAGEMENT

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CS McKee Expands Its Investment Capabilities with Three New Portfolio Managers

Paul Frank, Brad Thompson, CFA, and Clayton Wilkin, CFA, have joined CS McKee from Stadion Money Management

Chicago, IL (June 21, 2021) – CS McKee announced today that the portfolio management team of Paul Frank, Brad Thompson, CFA, and Clayton Wilkin, CFA, have joined the firm from Stadion Money Management, where they will be responsible for investing more than \$750 million in alternative and asset allocation mutual fund and private client separate account strategies. These are new assets that will be moving to North Square/CS McKee.

“We are extremely excited to have these three experienced managers with proven, long-term track records join the CS McKee team,” said Mark Gensheimer, President of CS McKee. “Paul, Brad and Clayton’s combined experience and skill sets will significantly bolster our investment capabilities,” Gensheimer added.

“We believe there is significant demand in the marketplace for alternative and multi-asset solutions, and these three experienced portfolio managers will position our organization to meet the needs of our consultant partners and institutional clients,” said Mark Goodwin, Co-Founder and CEO of North Square Investments, CS McKee’s majority owner and affiliate firm.

About CS McKee

CS McKee is an institutional investment management firm based in Pittsburgh, PA with approximately \$7.4 billion under management as of May 31, 2021 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.

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 industry veterans including John Amboian, Neil Cummins and Brian Gaffney, and backed by Estancia Capital Partners, we believe 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.

CS McKee and North Square Investments, LLC are investment advisers registered with the U.S. Securities and Exchange Commission. Registration does not imply a certain level of skill or training. More information about the companies' investment advisory services can be found in their respective Form ADV, which are available upon request. Past performance is not indicative of future results. This information contains opinions that are as of the date of this publication and are subject to change without notice. NSI-2021-14.

Important Information: There can be no guarantee that any strategy (risk management or otherwise) will be successful. All investing involves risk, including potential loss of principal.

Before investing you should carefully consider the Fund's investment objectives, risks, charges and expenses. This and other information is in the prospectus, a copy of which may be obtained by calling 855-551-5521. Please read the prospectus carefully before you invest.

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