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Brendan Kinnarney, Joe Michelotti and Steve Schneider Join North Square Investments

Chicago, IL (June 30, 2021) – North Square Investments today announced industry veterans Brendan Kinnarney, Joe Michelotti and Steve Schneider have joined the firm’s Distribution team as vice presidents. The announcement was made by CEO Mark Goodwin, who said all three will report to Head of Distribution, Phil Callahan.

“As we continue to build our firm and expand our investment capabilities, we are delighted to have these three individuals join North Square, Goodwin said. “With their backgrounds, experience and established relationships, we know that Brendan, Joe and Steve will be outstanding additions to our team.”

Callahan said Brendan, Joe and Steve will be responsible for partnering with financial intermediaries including broker dealer advisors, RIAs and private wealth managers in their respective regions. “We’re very excited to have Brendan, Joe and Steve join our firm to provide uninterrupted sales support and client service to former Stadion Money Management relationships, and to broaden our outreach into important channels, where they will be an essential resource to our partners,” Callahan said.

Kinnarney, Michelotti and Schneider were formerly employees of Stadion Money Management and most recently represented these funds as portfolio consultant directors for FLX Distribution from July, 2020 until North Square’s acquisition of the Stadion Funds was completed on June 14, 2021.

Prior to FLX, Brendan Kinnarney was a vice president and regional director for Stadion, where he had worked since 2014. Before Stadion, Brendan was a team/sales leader with State Farm. He earned his Business Administration degree from the College of Charleston in 2003.

Joe Michelotti joined Stadion in 2009 to launch Stadion's investment products in the retail distribution channel, serving advisors mainly in Michigan and Ohio. Joe’s prior experience includes working with Hartford Mutual Funds as a regional marketing director in Michigan in the same capacity. Joe received his Bachelor’s Degree from the University of Michigan, Ann Arbor.

Steve Schneider was previously a regional vice president of investments for Stadion, joining the firm in 2013 to help build Stadion's investment products in the retail distribution channel, and responsible for covering Northern California and the Pacific

Northwest. Prior to joining Stadion, Steve worked for 15 years as vice president of HighMark Funds in San Francisco. Next year will mark 40 years of experience for Steve in the financial services industry, having started his investment career with E.F. Hutton. Steve received both his BBA and MBA from the University of Iowa.

About North Square

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. We believe 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, through its multi-boutique platform, has over \$1 billion of assets under management in mutual funds following the Stadion Funds acquisition on June 14, 2021. North Square also has ownership interests (majority and minority, respectively) in the distinctly branded firms of CS McKee (over \$7B AUM) and Oak Ridge Investments with collective assets under management and advisement, together with North Square, of over \$10 billion.

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, a board composed of industry veterans including John Amboian, Neil Cummins and Brian Gaffney, and is backed by Estancia Capital Partners. Learn more about North Square Investments at northsquareinvest.com.

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