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North Square Caps Fifth Anniversary Year with The 4100 Group Investment

Chicago, IL (August 22, 2023) – North Square Investments (North Square), a multi-boutique manager with a range of equity, fixed income and multi-strategy product offerings, has capped its fifth anniversary year with a strategic capital investment from The 4100 Group. Terms of the investment were not disclosed.

“The strategic investment from The 4100 Group has provided North Square with significant additional capital to allow us to continue to progress with our ambitious growth plans,” said North Square CEO and Co-founder Mark Goodwin. “And it caps an anniversary year of positive and growing retail fund flows—for the past three years and year-to-date 2023—and strong performance across our North Square suite of diverse product offerings.”

Founded in the summer of 2018, North Square’s combined platform assets under management have grown from over \$1 billion to \$10.9 billion today. As of July 31, 2023, North Square had \$1.3 billion of assets under management (AUM) in 12 mutual funds. With North Square’s ownership interests (majority and minority, respectively) in the distinctly branded firms of CS McKee (\$8.2B AUM) and Oak Ridge Investments (approximately \$1.4B AUA), collective assets under management and advisement totaled \$10.9 billion.

Goodwin stated that proceeds from The 4100 Group’s capital investment are expected to fund a number of important strategic firm initiatives, such as acquisitions, new product launches and sales team additions.

“We are excited at the opportunity to deepen our existing relationship with the North Square team and look forward to being part of their continued success,” said Mike Gilmore, President and CEO of The 4100 Group. “They have been very thoughtful in the development of their platform and know how to compete every day, which is something we look for in a long-term partner,” he continued.

“With our differentiated investments, high quality and experienced subadvisors and current AUM relationships with over 500 retail firms and more than 9,000 advisors and teams, we believe North Square will continue on a significant growth trajectory,” Goodwin said.

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. 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.

About The 4100 Group

The 4100 Group (T4G) invests in wealth management and boutique asset management firms with cohesive teams focused on sustained business expansion and value creation. Expansion initiatives leverage its collective experiences, encourage innovation, and are supported with capital when necessary. T4G will also invest in opportunities that have strong potential to advance the performance of its portfolio companies.

About North Square

Founded in 2018 and headquartered in Chicago, IL, 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, North Square is a leader in aggregating best-in-class active managers and delivering select, in-demand investment strategies to financial intermediary partners 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. 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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