

## Oak Ridge Investments Announces Completion of Strategic Initiative

*Marketing, Distribution and Operations spun off to North Square Investments, providing greater resources for Oak Ridge investment team in a highly beneficial partnership.*

**CHICAGO – September 17, 2018**

Oak Ridge Investments is the beneficiary of a transformative realignment that lifts out 24 experienced professionals to form North Square Investments, led by CEO Mark Goodwin, who had previously been serving as President of Oak Ridge. The Oak Ridge Investments team will focus solely on the portfolio management and equity research efforts that have led to its exceptional long-term results, while receiving continuing access to the same sales, marketing and operations support in accordance to the terms of the transaction.

In the months and years ahead, the synergies of this new partnership will enable Oak Ridge Investments to:

- Achieve greater scale and profitability by growing assets under management
- Strengthen fundamental research capabilities underlying repeatable investment process
- Develop new solutions to address investor needs across growth equities, multi-asset and environmental, social and governance (ESG) investments

“This new structure benefits our Firm through broader distribution, increased economic strength and greater ability to invest in our business. These attributes, combined with our business philosophy of a long-term disciplined approach to investing and employee-ownership culture, will serve our clients well into the future,” explains David Klaskin, CEO & Chief Investment Officer of Oak Ridge Investments.

North Square’s focus is to source, develop and deliver institutional quality, active investment products to complement both passive and active strategies which North Square believes are at the core of well-designed portfolios. North Square CEO Mark Goodwin notes, “Providing distribution and operational scale to talented investment teams such as Oak Ridge is critical to our long-term success and that of investors. We thank David for his support and look forward to our ongoing collaboration with the entire Oak Ridge team.”

The two firms will be closely aligned and Klaskin has joined a market leading group in making a significant personal investment in North Square while remaining the largest individual shareholder of Oak Ridge. This close partnership provides Oak Ridge the ability to make strategic enhancements to its research capabilities and consider the development of new strategies for the benefit of its clients.

“The Oak Ridge Investments business is centered on the strength of our portfolio management and research team to deliver top results,” said Klaskin. “Through this new relationship, our team can continue to focus on what we do best; identifying dynamic, high-quality companies that offer capital appreciation potential and superior, risk-adjusted performance over time.”

Goodwin stated, “a close relationship with David Klaskin and Oak Ridge is ideal. When Oak Ridge Investments succeeds, it builds the credibility of the North Square platform which is designed to deliver outstanding active investment managers to the marketplace.”

The nearly 30-year successful history of Oak Ridge Investments has been characterized by an approach emphasizing client alignment, a disciplined, consistent repeatable investment process, and no lead portfolio manager turnover. “We set out to do things the right way by creating a culture where if our clients succeed, we succeed,” stated Klaskin. “With the many benefits this partnership provides, it’s important to note that our current mutual fund and separate account portfolios will continue to be managed by the same portfolio managers since their inception.”

**ABOUT OAK RIDGE INVESTMENTS:** Oak Ridge Investments is an SEC-registered investment management firm located in Chicago. Founded in 1989, Oak Ridge is focused on providing select, actively managed equity strategies to its broad range of clients. The firm currently manages over \$2 billion.

**ABOUT NORTH SQUARE INVESTMENTS:** Founded in 2018, North Square Investments is an independent, multi-boutique investment firm dedicated to vetting and delivering differentiated active investment strategies to the market.

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