

## **Logan Capital Management Adds Two U.S. (Sovereign SMA) Strategies to the Firm's Roster of Diversified Investment Offerings**

*Strategies and associated portfolio management teams will transition from Manulife Asset Management*

**Ardmore, PA – September 10, 2018** -- [Logan Capital Management](#) (Logan Capital), a registered investment advisor (RIA) with a series of equity and fixed income strategies, today announced an agreement to hire the Manulife Asset Management Sovereign Dividend Performers portfolio management team. The team currently manages two Sovereign SMA strategies, comprised of the Sovereign Dividend Performers Strategy and the Sovereign Dividend Performers Balanced Strategy.

Principal members of the Sovereign Dividend Performers team will be joining Logan Capital on February 1, 2019, providing continuity in portfolio management. Christopher P. O'Keefe CFA will join as Lead Manager, while Wayne M. Breisch CFA, Christopher P. Ouimet CFA, and Sarah J. Henry will join as Portfolio Managers/Analysts. In addition, Helene M. Darga will join the Logan Capital operations team.

“Logan Capital has a 25-year history of providing diverse and unique investment strategies for our clients. We are excited to bring the Sovereign team and their dividend growth strategies to the firm” said Dana Stewardson, a Founding Principal of Logan Capital. “The Sovereign strategies, which invest exclusively in companies with increasing dividends, focus on growth of principal and yield and more importantly, principal protection with the goal of providing above average risk-adjusted returns. Their strategies are a strong complement to Logan Capital’s Core strategy, which blends growth and concentrated value styles in a single account.”

“Given Logan Capital’s commitment to providing clients with diversified investment strategies, as well as their high-quality professional service, we are pleased to be joining their team and continuing to manage the Sovereign SMA strategies at Logan Capital,” said Chris O’Keefe, Vice President and Lead Portfolio Manager at Manulife Asset Management. “We look forward to continuing to provide our clients with the performance and service they have come to expect.”

The Sovereign team will continue to manage the assets at Manulife Asset Management until January 31, 2019. The move will be effective on February 1, 2019. Logan Capital will consider the various needs of sponsors, financial advisors and their clients to ensure a smooth transition. This includes accommodating the transition schedule that



works best within the January 31<sup>st</sup> time frame. Sponsors and financial advisors can learn more about the Sovereign SMA strategies by contacting one of the following:

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### **About Logan Capital Management**

Logan Capital Management is an employee-owned registered investment advisor (RIA) headquartered in Ardmore, Pennsylvania. Al Besse, Stephen Lee and Dana Stewardson founded the firm in 1993. Logan Capital Management has a long and successful history of working closely with financial advisors and their clients. The firm offers a mix of eight growth, value and fixed income strategies tailored to client's financial goals.

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