



Logan Capital Completes Acquisition of Two U.S. Dividend Performers Strategies

Strategies and five-person portfolio team expand Logan Capital's depth of expertise and complement the firm's Core strategy

ARDMORE, Pa. – February 1, 2019 – [Logan Capital Management, Inc.](#) (Logan Capital), a registered investment advisor with a series of equity and fixed-income strategies, announces the acquisition of two separately managed account strategies and their accompanying portfolio management team from Manulife Asset Management. Effective today, the strategies add approximately \$900 million in assets and have been rebranded as the Logan Dividend Performers Strategy and Logan Dividend Performers Balanced Strategy.

The Logan Dividend Performers Strategy and Logan Dividend Performers Balanced Strategy invest in companies with over five years of dividend growth and market capitalizations exceeding \$2 billion. The portfolios are composed of equity selections reflecting the extensive research and risk-and-return analysis of the veteran portfolio management team.

"We are always seeking opportunities to broaden our expertise and enhance our service offerings," says Dana Stewardson, a Founding Principal of Logan Capital. "With the addition of the dividend performers strategies, our clients and partners will see a unique complement to our Core strategy that blends growth of principal with principal protection and above-average risk-adjusted returns. Notably, the strategies allow for allocation flexibility between equity and fixed income, providing a tremendous opportunity to design customized portfolio solutions for clients."

The dividend performers portfolio management team will assume new roles at Logan Capital. Christopher P. O'Keefe, CFA, will join as Lead Manager, Wayne M. Breisch, CFA, Christopher P. Ouimet, CFA, and Sarah J. Henry will join as Portfolio Managers/Analysts and Helene M. Darga will join the operations team.

O'Keefe adds: "Logan Capital has a long history of performance and high-quality professional service, a philosophy that mirrors our team's approach. We're thrilled our expertise and investment management approach will expand Logan's existing offerings and provide continuity to the partners who will continue to align with us."

The Logan Dividend Performers Strategy and Logan Dividend Performers Balanced Strategy are available on 16 top advisor platforms, including Wells Fargo, UBS, Janney Montgomery Scott, LPL, BNY Mellon/Lockwood, Envestnet, Hilltop Securities, and RBC, among others.

"As the financial services industry evolves, there is an emerging need for broader and more talented portfolio management teams. The dividend performers team brings a dynamic background and expertise to benefit our clients, and we're excited to embrace this next phase of growth for Logan Capital," says Stewardson.

Additional information on the strategies can be found on the Logan Capital website:

<https://logancapital.com/strategies/>. Advisors and sponsors with questions may contact Christopher M. Travers, Managing Director, National Sales and Business Development (cmtravers@logancapital.com).



About Logan Capital Management, Inc.

Logan Capital Management, Inc. (Logan Capital) 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 has a sustained history of working closely with financial advisors and their clients. The firm offers a mix of ten Core growth, value, global and fixed income strategies tailored to client's financial goals. For more information, please visit: www.logancapital.com.

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