



Logan Capital Moves Headquarters to Newtown Square to Support Firm's Ongoing Expansion
\$3B RIA transitions to larger space to accommodate continued growth in assets and headcount in 2020 and beyond

NEWTOWN SQUARE, Pa. — Feb. 18, 2019 — [Logan Capital Management, Inc.](#) (Logan Capital), a registered investment adviser with a series of equity and fixed-income strategies, has completed its move to new office space, allowing the firm to better serve its clients and expanding team.

Effective today, the firm opens its doors at the Ellis Preserve office complex in Newtown Square, Pennsylvania (3843 West Chester Pike, Suite 150, Newtown Square, PA 19073). The brand-new space has a more modern, energy-efficient design, as well as an office layout more befitting the growing firm.

"Our proximity to services, hotels and facilities will aid our client services, and the location brings us closer to investment peers," said Stephen Lee, a Founding Principal at Logan Capital. "We had a great year in 2019, and we're excited to benefit from the new office space moving forward."

2019 represented a year of impressive growth, in which the firm added approximately \$1.3 billion in assets and surpassed \$3 billion in total assets (as of Dec. 31, 2019). The fourth quarter was particularly strong, with performance exceeding Logan Capital's three-year average for the same time period.

"We were pleased with our performance in 2019, especially as we approached year-end and noted an acceleration of new business across almost all distribution channels through December," said Christopher Travers, Managing Director, National Sales and Business Development at Logan Capital.

A major driver in the firm's 2019 growth was its acquisition of two dividend performers strategies and the successful onboarding of the team managing those strategies last February. 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 have more than a 15-year track record and are composed of equity selections reflecting the extensive research and risk/return analysis of the veteran portfolio management team.

"The Dividend Performers team joining us at the start of 2019 and our Financial Institutions Group business accelerating at the pace it has since launching in 2016 demonstrate our increasingly diversified distribution capability and better-than-ever product mix," said Dana Stewardson, a Founding Principal at Logan Capital. "The healthy diversity of the product usage across platforms provided flows into our 60/40 CORE product, as well as our Large Cap Growth, Logan Growth, International Dividend ADR and Dividend Performers models. We look forward to further building on our team and strategies in 2020."

In addition to augmenting its team, Logan Capital will work closely with its platform partners to assist them with business development objectives and potentially broaden the firm's offering mix, as appropriate.

Additional information on Logan Capital's strategies can be found on the Logan Capital website: <https://logancapital.com/strategies/>. Advisors and sponsors with questions may contact Travers (cmtravers@logancapital.com).

About Logan Capital Management, Inc.

Logan Capital Management, Inc. (Logan Capital) is an employee-owned registered investment advisor (RIA) headquartered in Newton Square, Pennsylvania. Al Besse, Stephen Lee and Dana Stewardson founded the firm in 1993. Logan Capital Management has a sustained history of working closely with financial advisors and their clients. The firm offers a mix of 10 growth, value and fixed-income strategies tailored to clients' financial goals. For more information, please visit: www.logancapital.com.

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