

Contact: Danielle Orsino
Water & Wall Group
646-343-9672
danielle@waterandwallgroup.com



Resolute Investment Managers Announces Investment in Green Harvest Asset Management

Firm Acquires Minority Interest in Asset Management Firm With ETF Expertise

IRVING, Texas – April 30, 2019 – [Resolute Investment Managers](#), Inc. (“Resolute”), a diversified, multi-affiliate asset management platform with more than 40 affiliated and independent investment manager partnerships, announced today an agreement to acquire a minority interest in [Green Harvest Asset Management](#), a Portsmouth, New Hampshire-based asset manager specializing in providing tax-loss harvesting strategies that are designed to provide tax benefits through portfolios comprised of low-cost, brand-name, exchange-traded funds (ETFs).

“The Green Harvest team is made up of some of the industry’s most seasoned and talented ETF professionals, and we couldn’t be happier to partner with them,” Gene Needles, chairman and CEO of Resolute Investment Managers, said. “In less than two years, Green Harvest has demonstrated that its unique approach is incredibly effective in helping investors reach their goals and reduce the impact of taxes. Their highly differentiated strategies complement those of many of our other affiliates and we expect our clients to benefit from them, especially as interest in tax-managed investing grows.”

Green Harvest was founded in May 2017 by Robert Holderith, a longtime veteran of the financial services industry and an early adopter of ETFs. Green Harvest aims to capture the return of an index and generate tax benefits by using ETFs rather than individual securities, focusing primarily on equity and fixed-income strategies. Green Harvest’s proprietary, advanced technology – a key component of its tax-loss harvesting strategy – optimizes ETF selection, maximizes the capture of tax benefits, minimizes tracking errors, and efficiently implements trading. The firm’s clientele is comprised of high-net-worth individuals who tend to be more tax-sensitive than other investors, and its products are offered through separately managed accounts.

“Our entire team is thrilled for what this milestone means for our firm and our clients,” Mr. Holderith, Green Harvest’s founder and CEO, said. “We’re grateful to have found a partner like Resolute that understands our business, respects what we do and, most importantly, shares our values. We see great synergy between our two firms and look forward to tapping into Resolute’s resources and capable sales team while expanding their suite of investment strategies.”

Resolute’s primary role will be to provide additional distribution resources and operational support to Green Harvest, which will continue to operate independently. Clients will not see any changes in either firm’s daily operations or personnel.

Concurrent with this announcement, Green Harvest also announced the promotion of Brian Jacobs, CIMA® to president. Prior to his promotion, Mr. Jacobs served as Green Harvest’s chief operating officer and head of distribution. He has more than 25 years of experience in global investment management.

Resolute was advised by Raymond James | Silver Lane and Skadden, Arps, Slate, Meagher & Flom LLP.

About Resolute Investment Managers

Resolute Investment Managers, Inc. is a diversified, multi-affiliate asset management platform with affiliated and independent relationships with more than 40 investment managers. Driven by future value creation, Resolute offers a unique platform that delivers strategic benefits through a full suite of distribution, operational and administrative services that may be leveraged by our affiliates. With roots as an unaffiliated sub-advised mutual fund sponsor, the majority of Resolute’s partnerships are with asset managers who invest and operate with full autonomy and independence. As of March 31, 2019, the affiliated companies of Resolute Investment Managers had \$70.0 billion in assets under management. For more information, visit www.resolutemanagers.com.

About Green Harvest Asset Management

Green Harvest Asset Management was formed in 2017 by a team of seasoned ETF and asset management experts to provide tax-beneficial investment products and services. The firm specializes in creating and managing ETF portfolios seeking to track U.S., global and custom indices while maximizing after-tax returns using capital loss harvesting strategies. Because of the broad ETF expertise spread throughout the firm, Green Harvest is active in index and product development, ETF strategy development and trading. The firm regularly partners directly with wealth advisors to create and deliver the strategy that is best suited for clients’ needs. As of March 31, 2019, Green Harvest had \$40.5 million

in assets under management and \$116 million in assets under advisement. For more information, visit www.greenharvestam.com.

Investments & Wealth Institute[™] (The Institute) is the owner of the certification marks “CIMA[®],” and “Certified Investment Management Analyst[®].” Use of CIMA[®] or Certified Investment Management Analyst[®] signifies that the user has successfully completed The Institute’s initial and ongoing credentialing requirements for investment management consultants.

RIM2019-PRESS-2 04/19

###