



LMCG Investments, LLC Launches Collaboration with Fidelity SAN Network

(June 24, 2020) Boston-based [LMCG Investments, LLC](#) ("LMCG"), announced today that it has collaborated with Fidelity's SAN Network to offer their Fixed Income strategies broadly. LMCG's Core Bond and Municipal Bond strategies will both be on the SAN network. The Core Bond strategy is an active total return strategy that seeks to outperform the broader fixed income market over time and through various interest rate environments. The Municipal Bond strategy is a tax-sensitive approach to investing that seeks to maximize tax advantaged current income. This strategy is customized to each client's state of residence and tax status.

In addition to the pursuit of income, total return and tax efficiency, LMCG's fixed income strategies aim to protect and preserve a client's originally invested capital by investing in only high-quality Investment grade rated investments and maintaining a short-to-intermediate portfolio duration position.

"We're excited to partner with Fidelity to bring our actively managed bond strategies to their advisors and clients", says Matt Guleserian, CFA, Director of Fixed Income at LMCG. "Our high-quality fixed income approach, whether as a standalone strategy or as a complement to other investment strategies, should provide clients with the risk diversification, principal protection, current income and/or tax efficiency that they need. I look forward to working closely with our newest partner to deliver our boutique investment strategies and services, supported by Fidelity's infrastructure and national reach, in addition to helping them expand their platform."

About LMCG Investments, LLC

LMCG Investments, LLC (LMCG) is a Boston-based investment management firm offering a broad range of investment strategies to institutional and private clients, including corporate and public pension plans, foundations, endowments, family offices, mutual funds and individuals. LMCG manages equity portfolios across a range of market caps, investment styles and U.S. and international regions, structured credit and U.S. fixed income securities. LMCG's investment teams, together with leadership, operational, compliance and client service teams, share the common goal of delivering superior investment performance to their clients. For more information, please visit: www.lmcg.com

About Fidelity SAN®

Fidelity's Separate Account Network® (SAN) is a unified platform for managed portfolios allowing you to create a managed account program that is tailored to your firm and your clients. SAN allows you to create a customized program via its dual-contract, open architecture design. It provides access to more than 600 separate account managers (as of 4/31/2020) and clients can take advantage of the opportunity to select and negotiate directly with those managers. The goal is to help clients ensure that they are always future-ready by providing knowledgeable consulting, exceptional people, and transformative technology. Fidelity Clearing & Custody Solutions provides comprehensive clearing and custody platform, brokerage, investment, and reporting services, trading capabilities, practice management and consulting to registered investment advisors (RIAs).

There can be no guarantee that any strategy (risk management or otherwise) will be successful. All investing involves risk, including the potential loss of principal.