

MORROW SODALI

Press Release

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MORROW SODALI AND DI COSTA PARTNERS TO PROVIDE MUTUAL FUND AND ETF SERVICES

New York – January 24, 2019: Morrow Sodali announced today that Vincent Di Costa, founder of Di Costa Partners, has joined the firm as head of strategic and solicitation services for mutual funds and Exchange Traded Funds (ETFs). Mr. Di Costa pioneered the development of customized fund services and has been the industry’s market leader for decades.

The combination of Morrow Sodali and Di Costa Partners creates a global service provider with expertise that covers the entire ownership population of public companies – institutions, owners in registered and street name accounts and beneficial owners in mutual funds and ETFs.

Mr. Di Costa said, “After 35 years in the industry, I am excited by the opportunity to expand our business in combination with Morrow Sodali. Our team’s knowledge and experience in the fund industry, together with Morrow Sodali’s global reach and our shared expertise in proxy solicitation, corporate governance, shareholder analytics, vote projections, market surveillance and strategic advice will enable us to provide a full-service package that meets the demands of today’s complex financial markets.”

Alvise Recchi, CEO of Morrow Sodali, said, “The vision behind this business combination is very much focused on the future and on the growing importance of retail investors. Together, Morrow Sodali and Di Costa Partners are equipped to reach the full spectrum of shareholders, regardless of whether their shares are registered, held in street name, or through mutual funds or ETFs. No other firm provides clients with this scope of expertise and services.”

John Wilcox, Morrow Sodali chairman, said, “Retail investors, including those in managed accounts, are increasingly aware of their rights as shareholders and are seeking to make their views known on issues such as the environment, social policy and corporate governance as well as the financial performance of the companies where their assets are invested. Our firm has the expertise and resources necessary to help our corporate clients understand and reach all these audiences.”

About Morrow Sodali

Morrow Sodali is the leading global consultancy providing comprehensive governance and shareholder services to corporate clients around the world. The firm provides companies and their board of directors with strategic advice and services in corporate governance, capital markets intelligence, shareholder communication and engagement, proxy solicitation, activism and related ownership issues.

From headquarters in New York and London, and offices and partners in major capital markets, Morrow Sodali serves more than 700 corporate clients in 40 countries, including many of the world’s largest multinational corporations. In addition to listed and private companies, its clients include mutual funds, stock exchanges, membership associations and activist investors.

For further information about Morrow Sodali, please visit www.morrowsodali.com.

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