



May 18, 2018  
St. Louis, Missouri

Confluence Investment Management LLC (Confluence) is pleased to announce that it has completed the acquisition of the assets of Gratry & Company, LLC (Gratry), effective April 30, 2018.

“We believe the long-term prospects are bright for this combination,” stated Mark Keller, CEO & Chief Investment Officer of Confluence. “The operational integration has been completed and we are now focused on coordinating our distribution efforts with a view toward growing our business.”

The transaction brings to Confluence a suite of international and global equity strategies to complement its current offerings of Equity, Balanced, Asset Allocation, and Alternative strategies. In addition, the intellectual capital of the firms can be shared to enhance the investment offerings delivered to clients, while maintaining the investment approaches of both teams. The legacy Gratry franchise will benefit from Confluence’s operational scale and distribution network.

The former Gratry investment team has joined Confluence but will continue to be based in Cleveland, OH.

**About Confluence Investment Management LLC –**

Confluence Investment Management LLC is an independent, registered investment adviser, located in St. Louis, Missouri, that provides professional portfolio management and advisory services to institutional and individual clients. Confluence’s investment products include Equity Strategies, Balanced Accounts, Asset Allocation Portfolios, and Alternative Investments. As of the end of 2017, Confluence had more than \$8 billion of assets under management and supervision.

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