



## **Capstone Financial Launches New Brand Name: Crossmark Global Investments**

*New identity crystallizes firm's commitment to responsible investing*

Houston, Texas – August 21, 2017 – Independent asset management firm Capstone Financial Services, Inc. announced today that it has adopted Crossmark Global Investments, Inc. (Crossmark) as its new brand name. As the firm enters its fourth decade providing responsible investment solutions to financial advisors and institutional investors across the country, the new brand name represents the intersection of clients' values and their investment choices.

"We are excited to launch the Crossmark brand, which embodies our long-standing commitment to responsible investing and differentiates our philosophy in the investment marketplace," the firm's President and Chief Executive Officer Michael Kern said. "At Crossmark, we believe strongly that investment portfolios can align with clients' personal values without sacrificing performance."

The firm is known for its highly customizable institutional portfolios, award-winning family of values-based mutual funds, the Steward Funds, and separately managed accounts across a broad array of investment strategies. The investment team's expertise in delivering screened solutions for a variety of responsible investing themes is evidenced today by 75% of the firm's assets under management being screened as of June 30, 2017.

The new brand identity follows a series of key additions to the senior management team over the past two years to further strengthen the firm's ability to meet the needs of values-based investors. Between 2015 and 2017, the firm added Mr. Kern as President and Chief Executive Officer, Andrew Jacobson as Chief Operating Officer, David Rentfrow as Managing Director and Head of Distribution, and Jim Coppedge as General Counsel and Chief Compliance Officer.

"The asset management industry is becoming increasingly competitive," Mr. Rentfrow said. "In order to not only survive but to also thrive, firms must have a clearly defined value proposition. Throughout our history, we have been innovators in responsible investing, helping institutional and individual investors align their values with a broad spectrum of expanding investment solutions. The rebrand to Crossmark Global Investments will redefine our place within a crowded marketplace."

To learn more about Crossmark, visit the firm's new website, [crossmarkglobal.com](http://crossmarkglobal.com), or [LinkedIn page](#).

### **About Crossmark Global Investments:**

Crossmark Global Investments is an independent investment advisor headquartered in Houston, Texas. The firm manages \$5 billion in assets in equity, fixed income and balanced accounts as of June 30, 2017. Founded in 1987, the firm serves retail and institutional investors across the country. Crossmark is the exclusive manager of the award-winning Steward Funds, a family of values-based screened funds. The Steward Funds are offered by Crossmark Distributors, Inc., member FINRA/SIPC.

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