



CROSSMARK GLOBAL INVESTMENTS ANNOUNCES LEADERSHIP TRANSITION

Chief Investment Officer Bob Doll to Add President and CEO Roles

Houston, Texas – January 16, 2024 - Crossmark Global Investments, a faith-based investment management firm, announced that Bob Doll, the firm’s Chief Investment Officer and a 44-year veteran of the asset management industry, will take on the additional responsibilities of President and Chief Executive Officer, effective today. Mr. Doll succeeds Mike Kern, who is stepping down from these positions to pursue other opportunities.

Mr. Doll has served as Crossmark’s CIO since June 2021, as well as portfolio manager for the firm’s multiple U.S. Large Cap Equity strategies. He is a highly regarded investment professional who has held leadership roles at several global asset management firms. Prior to joining Crossmark, he was Chief Equity Strategist and Senior Portfolio Manager at Nuveen Asset Management. His previous positions included serving as Chief Equity Strategist at BlackRock, President and Chief Investment Officer of Merrill Lynch Investment Managers, and Chief Investment Officer of Oppenheimer Funds, Inc.

“Crossmark’s clients have benefitted from Bob’s exceptional investment expertise, market perspective, and institutional leadership ever since he joined our firm, and we are excited about the vision and direction that he will bring to the organization in his expanded role as President & CEO,” noted a statement by the Crossmark Board of Directors. “Bob will also continue to serve as CIO, and his investment market acumen, including his perspective as the manager of our U.S. Large Cap Equity strategies, will be valuable elements of his overall vision for our firm. We are confident that Bob provides a unique combination of experience and insight that will inform our approach to serving clients’ needs and continue to set Crossmark apart from other investment advisory firms.”

“We are grateful to Mike Kern for his efforts to guide Crossmark’s progress as a leading faith-based investment advisory firm,” the Board added. “Under Mike’s leadership over the past eight years, Crossmark has made strides in transforming our culture, deepening our bench across all departments, and positioning the firm to build on its investment expertise going forward. We wish Mike much success in his future endeavors and look forward to exciting days ahead for Crossmark under Bob Doll’s leadership.”

Mr. Doll noted, “It is a privilege to be part of Crossmark, a firm that combines a deep commitment to faith-based values and a focus on investment excellence. In my new role, I look forward to continuing to enhance the firm’s investment solutions and to leading a team that is notable for its talent, unique culture, and passion for delivering exceptional client service.”

About Crossmark Global Investments:

Crossmark Global Investments, a faith-based investment firm offering values-based strategies, is headquartered in Houston, Texas. The firm reported \$6.2 billion in AUM as of December 31, 2023 via both separately managed accounts and the Steward family of mutual funds invested across equity, fixed income, liquid alternative, and derivative income asset classes.

For more information, visit www.crossmarkglobal.com

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