

Crossmark Global Investments Appoints Heather Lindsey as Managing Director of Platform Development & Strategic Relationships

Houston, TX – September 15, 2021 - Crossmark Global Investments, a faith-based investment management firm, is pleased to announce the appointment of Heather Lindsey as Managing Director of Platform Development & Strategic Relationships. In this newly created role, Heather will be responsible for developing engagement strategies to strengthen client relationships, overseeing business strategy for all aspects of distribution partnerships with wealth management platforms, and effectively positioning Crossmark’s investment strategies, overall mission, and core values.

“We are thrilled to have Heather on board with us and believe she will be instrumental to our firm’s growth,” says Mike Kern, President & CEO of Crossmark. “She possesses personal and professional values that establish a strong foundation for effective leadership, strategic thinking, and a deep understanding of client needs,” he adds.

Prior to joining Crossmark, Heather spent twenty-four years at Invesco, where she held multiple significant roles, including two years as SVP, Head of Strategic Accounts, ten years as Senior Director, Retirement & Insurance Platforms and six years as VP, Senior National Account Manager.

“I’m honored to be joining a firm that prioritizes client partnerships and leads with a values - first approach,” says Lindsey. “Crossmark’s dedication to its team and determination to provide the best possible client experience is unique, and I look forward to being a part of such an admirable culture,” she says.

Crossmark’s addition of this new role aligns with the firm’s long-standing core mission to meet client needs with a values-based approach. Heather will report directly to Crossmark’s President & CEO, Mike Kern, and will be the newest member of the firm’s Executive Team.

Hiring Heather Lindsey comes shortly after the hiring of Bob Doll as CIO in June. These two industry veterans have been added to expand and accelerate Crossmark’s asset growth, product line, and sales and distribution relationships.

About Crossmark Global Investments:

Crossmark Global Investments is a faith-based investment management firm that provides a full suite of investment strategies to institutional investors, financial advisors, and the clients they serve. For over 30 years, the firm has delivered uniquely constructed products based on its proprietary, disciplined, and repeatable process. Crossmark is especially known for helping its clients align their investments with their values by creating socially conscious, responsible

investment strategies. Founded in 1987, the firm is headquartered in Houston, Texas. For more information visit: <https://www.crossmarkglobal.com>.