



**Estancia Capital Management/Sustainable Growth Advisers**

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For Immediate Release

**ESTANCIA CAPITAL MANAGEMENT  
ANNOUNCES SALE OF ITS INTEREST IN SGA**

Scottsdale, AZ, February 5, 2018 – Estancia Capital Management, LLC (“Estancia”), a leading private equity fund focused exclusively on the global Asset Management, Wealth Management, and related Business Services industries announced today that it has sold its interest in Sustainable Growth Advisers L.P. (“SGA”) to Virtus Investment Partners Inc. (“Virtus”).

Danny Kang, Managing Director of Estancia, stated: “It’s been a pleasure to partner with SGA’s management team in building an institutional asset management firm that grew from approximately \$5 billion to nearly \$12 billion in assets under management since formalizing our partnership in August 2013.” Managing Director, Michael Mendez added, “We were very pleased with SGA’s accomplishments during our ownership. The company achieved strong organic growth in new distribution channels we analyzed and supported. Importantly, SGA is well positioned to consistently deliver excess returns benefiting the firm’s clients, capitalize on the opportunities for its U.S., Global, International and Emerging Markets portfolios and continue its growth trajectory with its new strategic partnership with Virtus.”

“Estancia has added a lot of value to SGA during our partnership. Their vision and guidance in the areas of operations, compliance, business development and client service have enabled us to strengthen our position in the institutional market while remaining focused on managing client portfolios” said Gordon Marchand, SGA Co-Founding Principal.

The closing of the transaction is subject to customary closing conditions.

**About Estancia**

Estancia is a private equity firm focused on small to lower middle market investments in Institutional Quality Asset Management, Wealth Management, and related Business Services companies. The Principals – Messrs. Mendez, Moriuchi, Kang, Jeffries, and Kurttila – have a history of partnering with management and investment teams in providing buyout/growth capital to facilitate the strategic and opportunistic development of portfolio companies including management buyouts from larger financial firms, private ownership/succession transitions, and growth initiatives.

**[www.EstanciaPartners.com](http://www.EstanciaPartners.com)**



**About SGA**

Founded in 2003, Sustainable Growth Advisers (“SGA”) is an institutional asset management boutique focused on providing high value-added U.S., Global, International and Emerging Markets portfolios. SGA currently manages approximately \$12 billion in client assets. [www.sgadvisers.com](http://www.sgadvisers.com)

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