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Q Describe your firm, its offerings and its mission.

Palmer Square Capital Management provides investment advisory services, proprietary funds and customized allocations focused on alternative investments such as hedge funds and private equity funds. The firm serves a diverse set of clients across high-net-worth, registered investor advisor firms and institutional clients.

Q Describe your investment strategy and how it might be unique.

Palmer Square focuses specifically on alternative investments. The team has years of experience directly investing in alternative investments such as hedge funds as well as equity and credit-related hedge fund strategies, risk management and derivatives. Palmer Square is uniquely qualified to perform deep due diligence on alternative investment opportunities, access a variety of alternative funds across the world, and structure proprietary alternative investment funds. Its competitive advantage is drawn from an experienced team with deep backgrounds in equity, credit, hedging, derivatives and a heavy focus on risk management. Due to its long-standing relationships, Palmer Square has access to global hedge fund managers.

Q Describe how your investment products fit into a well-rounded asset allocation strategy.

We believe that non-traditional assets should play a role in a well-rounded asset allocation strategy. Palmer Square provides proprietary funds focused specifically on alternative investments.

Q How has your firm adapted during the recent economic downturn?

Palmer Square is an affiliate of Montage Investments, which brings together world-class investment managers – each offering a distinct approach that reflects many decades of professional experience and proprietary investment strategies across global asset classes.

The effects of the recent economic downturn, combined with the fact that Montage has a stable and growing business and a goal to build a unique financial services firm, has provided it with unique opportunities. The firm's organizational approach is to allow individual investment managers to retain boutique processes, talent and culture that have proven records of adding value to portfolios and meeting client objectives. Montage is committed to maximizing the potential of diverse institutional approaches to investment management, and believes that this provides clients with a growing range of investment solutions so they can respond effectively to an increasingly complex global investment marketplace.

AT A GLANCE

Firm name: Montage Investments/Palmer Square
Principals: Four
Employees: Approximately 300
Location: Leawood, Kansas
Years in business: Five
Assets under management: \$9 billion
Minimum investment: Varies