



## **iM Global Partner deepens US presence by partnering with Richard Bernstein Advisors**

**Paris, New York - July 28, 2021.** iM Global Partner, a leading global asset management network, has made another landmark alliance in its US expansion by entering a partnership with Richard Bernstein Advisors (RBA). The firm acquired a 45% non-controlling stake in RBA as of July 28, 2021.

RBA is a renowned New York-based asset allocation specialist founded in 2009 by Richard Bernstein. With \$14.6bn in assets under management and advisement as of June 2021, RBA is one of the largest and most successful independent firms among asset allocation specialists globally. RBA manages ETF-based asset allocation SMA (Separately Managed Accounts) portfolios for many industry-leading wealth management and Registered Investment Advisors (RIA) platforms in addition to sub-advising several mutual funds, unit trusts, and ETFs.

RBA is unique in its “top-down” research approach, which combines proprietary, macroeconomic research with quantitative analysis. Its disciplined, fundamentally driven and time-tested investment process seeks to uncover global cyclical and secular investment themes with the aim of providing superior, risk-adjusted returns. Constructed portfolios focus on allocating assets across various countries, sectors, sizes and styles to generate alpha, while minimizing the security selection risk.

The team of investment personnel is highly experienced with an average 27-years in the industry. The most senior Investment Committee members worked together prior to the formation of RBA and this history allows for a consistently applied and robust investment process. They will continue to run operations independently and manage portfolios using the same philosophy and approach developed in 2009, as is the case with all Partners of iM Global Partner.

### **Deal accelerates iMGP’s US expansion**

The partnership is a major milestone in iM Global Partner’s US strategic expansion. The worldwide network now includes several leading firms in the U.S including: Polen Capital, Dolan McEniry, Scharf Investments and Litman Gregory. The addition of RBA with its strong distribution and visibility among leading wealth management platforms deepens iM Global Partner’s footprint in the US market and reinforces the firm’s commitment to growth.

**Richard Bernstein, CEO, CIO and Founder of Richard Bernstein Advisors** said: “This is the formation of a very powerful symbiotic relationship between iM Global Partner and RBA. iM Global Partner’s proven European institutional distribution and offshore capabilities will expand RBA’s investor base globally, whereas RBA’s broad US visibility will significantly enhance iM Global Partner’s rapidly growing presence in the US.”

**Philippe Couvrecelle, CEO and Founder of iM Global Partner** commented: “RBA is a great addition to our network of Partners and their expertise is unanimously recognized in the US. RBA will bring our clients around the world outstanding expertise in asset allocation portfolios with a unique top-down macro approach that has proven its high efficiency in all phases of the market cycle. The partnership not only demonstrates the scale and vision of our global network, but also underlines our deep commitment to the US market.”



For RBA, Piper Sandler & Co. acted as financial advisor and Vedder Price acted as legal counsel. For iM Global Partner, Hottinguer Corporate Finance acted as financial advisor and Seward & Kissel acted as legal counsel.

### **About iM Global Partner**

iM Global Partner is a worldwide asset management network. It selects and builds long-term partnerships with talented and independent asset management companies through direct capital ownership. iM Global Partner is present in 16 locations across Europe and the United States and provides its clients with access to the best management strategies of its Partners. iM Global Partner represents around 35 billion USD of assets under management as of end of July 2021.

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### **About RBA - Richard Bernstein Advisors**

Richard Bernstein Advisors LLC is an independent registered investment manager. RBA manages ETF asset allocation SMA portfolios at Merrill Lynch, Morgan Stanley, Ameriprise, UBS, Investnet, and other select RIA platforms. RBA acts as sub-advisor for the Eaton Vance Richard Bernstein Equity Strategy Fund and the Eaton Vance Richard Bernstein All-Asset Strategy Fund and offers income and theme-oriented unit trusts and ETFs through First Trust. RBA also manages assets on behalf of several large institutional investors. RBA's investment insights as well as further information about the firm and products can be found at [rbadvisors.com](http://rbadvisors.com)

### **Existing Partners with iM Global Partner**

Polen Capital - US & Global growth equities, Partner since 2015

Dolan McEniry - US credit, Partner since 2016

Sirios - US long/short equities, US credit, Partner since 2018

Dynamic Beta investments - Liquid alternatives, Partner since 2018

Scharf Investments - US value equities, Partner since 2019

Zadig Asset Management - European equities, Partner since 2020

Richard Bernstein Advisors - Global asset allocation, Partner since July 28th 2021