

Asset Preservation Advisors and iM Global Partner announce expansion strategy in Municipal Bond market

Paris, Atlanta - March 3, 2022. Asset Preservation Advisors (APA) and iM Global Partner today announce their strategic growth plan to expand in the municipal bonds area. iM Global Partner and APA became partners in September 2021 when iM Global Partner took a non-controlling stake (42%).

Kevin Woods, co-CEO and CIO of APA said:

“We are pleased that municipal yields have moved higher since the start of the year. Higher rates not only generate a greater level of re-investable income but also provide greater after-tax returns for our clients. In the current market environment with an uncertain economic outlook, we continue to build portfolios targeting a high level of credit quality, defensiveness and lower volatility.”

“We are really pleased with our partnership with iM Global Partner. We look forward to the future growth of our company, organically and through potential acquisitions.”

Philippe Couvrecelle, CEO and Founder of iM Global Partner commented “We believe APA has fantastic potential and will continue to grow organically. In addition, we will support any acquisition of a specialized team or asset management company that could be made by APA in the Municipal Bond sector. We are convinced that they have the right management team and the appropriate infrastructure and operational set up to be a consolidating platform in the municipal bonds space.”

Jeff Seeley, Deputy CEO, US Chief Operating Officer & Head of US Distribution of iM Global Partner added: “Since our partnership began, we have seen strong initial interest for APA’s conservative investment approach and their ability to customize portfolios for clients. We are confident this business will grow through our partnership. In fact, we are collaborating on a new fund with APA. The team at Asset Preservation Advisors has a deep understanding of the municipal market and we are delighted to see the potential for expansion in this market.”

[About Asset Preservation Advisors](#)



Asset Preservation Advisors (APA) was founded in 1989 and is a leading independent investment advisor specializing in managing high quality tax-exempt and taxable municipal bond portfolios for registered investment advisors, family wealth offices, financial advisors and institutional clients. Since its founding, Asset Preservation Advisors has been committed to delivering the highest level of quality service and wealth preservation. A consistent investment process and corresponding trading discipline led to APA's growth in assets under management over the past three decades. APA currently manages \$5.3 billion (as of 12/31/21) for clients in 35 states and in Europe.

<https://www.assetpreservationadvisors.com/>

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. It represents over US\$38 billion of assets under management as of end December 2021.

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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 2021

Asset Preservation Advisors - US municipal bonds, Partner since September 2021

APA Disclosures: APA is an investment adviser registered with the U.S. Securities and Exchange Commission. Registration does not imply a certain level of skill or training. More information about the advisor including its investment strategies and objectives can be obtained by visiting www.assetpreservationadvisors.com. A copy of APA's disclosure statement (Part 2 of Form ADV) is available without charge upon request. Our Form ADV contains information regarding our Firm's business practices and the backgrounds of our key personnel. Please contact APA at 404-261-1333 if you would like to receive this information. APA-2202-18
