



Jackson Square Announces Transition to New Chief Investment Officer and Chair

Long-term succession plan sees CIO and Chair Jeff Van Harte retire, appointing new leadership team.

SAN FRANCISCO, CA, January 12, 2023 -- Jackson Square Partners today announced a long-planned transition of Chief Investment Officer and Chair responsibilities to the next generation of leadership at the firm, as founding partner, Chair and Chief Investment Officer Jeff Van Harte plans to retire in 2024 after nearly four decades leading the team. Ian Ferry, a founding member of the firm and portfolio manager with more than eighteen years of investment experience will assume Chief Investment Officer duties, in July of 2023.

The company has also announced that Kenneth Broad, founding partner and portfolio manager, has been appointed co-Chair of the firm and will assume the Chair role full-time from Mr. Van Harte in July of 2024.

Jeff Van Harte led Jackson Square's investment team from its genesis in the 1980s, throughout its history as part of Transamerica Investment Management and Delaware Investments, and finally within Jackson Square Partners, an independent partnership. The historic timeline is available at this link on the company's website: <https://jspartners.com/firm/?st=timeline>

"Over the years, Jackson Square has cultivated a deep bench of investment talent which has allowed for this seamless generational change and natural continuation of existing responsibilities," said Jeff Van Harte. *"I am pleased to be handing over my responsibilities to individuals that I personally know embody the culture and values of Jackson Square, while also infusing it with new energy to tackle challenges and achieve successful results."*

As CIO, Ian Ferry will assume full leadership of the investment team, expanding his oversight of the research agenda and enhanced risk management functions. He will also continue in his role as Portfolio Manager for the SMID-Cap Growth and Small-Cap Opportunities strategies.

Mr. Ferry is a founding member of Jackson Square Partners, serving as a portfolio manager and analyst since its inception in May 2014 and a member of the investment team since November 2011. His investment experience and leadership qualities make him a natural choice for the CIO role. As portfolio manager of the Jackson Square SMID and Small-Cap Opportunities strategies, Mr. Ferry demonstrated leadership and investment acumen, while guiding the research agenda for the strategies over the last 5 years. More recently he led the effort to make enhancements to the investment team's risk management process. He has also been instrumental in recruiting new investment talent to the firm.

“I am honored to assume the responsibility of Chief Investment Officer at Jackson Square and will apply much of what I have learned from Jeff over the years in stewarding our clients’ capital,” said Mr. Ferry. “I believe the opportunity set for patient, high-conviction and long-term investors is even more compelling today than when I started my career and am excited to be part of the leadership team guiding the future of our firm.”

Kenneth Broad is a founding member of Jackson Square Partners and has served as a portfolio manager since its inception in May 2014. More than three decades of experience and over 20 years as a member of the investment team focused on the SMID-Cap Growth strategy, which has become central to the franchise, make him an obvious selection to continue to shape the values and culture at Jackson Square. Mr. Broad will continue in his role as portfolio manager for the SMID-Cap Growth and Small Cap Opportunities strategies, including active, consultative engagement with portfolio companies to drive value for clients.

“Everyone at the firm owes a debt of gratitude to Jeff’s leadership and vision,” said Mr. Broad. “I plan to follow in his footsteps in nurturing the key values that have made Jackson Square a great place to work and serve our clients, including a focus on curiosity, collaboration and healthy debate.”

As part of the transition, Mr. Van Harte will also step away from his portfolio management duties for the Jackson Square Partners Large Cap Growth Fund effective June 30, 2023. Current co-manager, Billy Montana, will become Lead Portfolio Manager of the strategy.

Additional biographical information about the new leadership team is available at the following links on the Jackson Square’s team web page - [Ian Ferry](#), [Kenneth Broad](#) and [Jeff Van Harte](#).

About Jackson Square Partners

Jackson Square Partners, LLC (“Jackson Square”) is an independent, majority employee-owned investment manager, specializing in long-only, growth-oriented equity investing, offering the following investment strategies: Large-Cap Growth, Global Growth, SMID-Cap Growth, and Small-Cap Growth. In its long-term approach to investing, Jackson Square believes attractive returns can be realized by owning a concentrated portfolio of companies that have superior business models, strong cash flows and the opportunity to generate consistent growth of intrinsic business value over time. The San Francisco-based firm was founded in 2014.