

PHOENIX AMERICAN FINANCIAL SERVICES ANNOUNCES NEW PARTNERSHIP WITH WATERMARK CAPITAL PARTNERS AND TRILOMA SECURITIES.



SAN RAFAEL, CA – Phoenix American Financial Services, Inc. (“the Company”) is pleased to announce its new partnership with Watermark Capital Partners, LLC (“Watermark”) and Triloma Securities, LLC

(“Triloma”). The Company will support Watermark and Triloma with their state of the art transfer agent system and industry leading investor services platform. Watermark will benefit from Phoenix American’s combination of advanced technology, commitment to customer service and long experience with the unique operational requirements of real estate funds.

Based in Chicago, IL, Watermark is a leading real estate investment management firm that focuses on lodging and lodging-related assets including hotel, resort, golf, and resort residential properties. Watermark’s current investing activities are focused on its private investment funds and the firm co-manages Carey Watermark Investors Incorporated and Carey Watermark Investors 2 Incorporated, two public, non-listed real estate investment trusts.

Triloma Securities is based in Winter Park, FL, and is the exclusive Dealer Manager for Watermark’s private real estate funds. Triloma Securities, member FINRA/SIPC, is a registered broker-dealer and wholly owned subsidiary of Triloma Financial Group. Triloma Financial Group is a private investment management firm that was created to provide individuals with access to alternative investment opportunities. Through its partnership approach and independent model, the seasoned team is able to better anticipate client needs to help them meet their goals.

“Working with industry leaders such as Watermark and Triloma is an exciting opportunity for us,” said Andrew Constantin, Senior Vice President, Operations at Phoenix American. “Phoenix prides itself on the service and capabilities it can bring to the Reg D and real estate fund markets and we feel this is a perfect partnership that takes advantage of the strengths of all three firms to create tremendous value for investors, number one, and important strategic efficiencies for the firms.”

With the growing sophistication of alternative real estate funds and the increased regulatory compliance they require, advanced and integrated operational solutions are critical to the success of today’s fund companies. Phoenix American has been developing and refining the most efficient systems and back office processes in alternative investments since its origins as a sponsor of equipment leasing funds beginning in 1972. The Company’s STAR-XMS transfer agent system, the most advanced in alternative investments, is the result of the Company’s direct experience as a fund sponsor as well as decades of experience as a back office provider to every kind of alternative investment fund.

“As a leading real estate investment firm, with an established reputation in the alternative fund space after most recently building two successful public programs, we seek to partner with best-in-class service providers”, said Michael Medzigian, Chairman and Managing Partner at Watermark. “We are excited to work with Phoenix American, an experienced firm in the space with leading products for

“At Triloma, we continue to focus on working with seasoned sponsors to bring innovative offerings to the broker-dealer community,” said Nick Dolya, President for Triloma Securities. “Providing all investors with a great client experience is very important to us, so we look forward to our clients benefiting from Phoenix American’s unique capabilities for private offerings.”

Phoenix American Financial Services, Inc. provides back office outsourcing, fund accounting and transfer agent services as well as sales and marketing reporting services to fund companies in the alternative investment industry. The Company is an affiliate of Phoenix American Incorporated along with Phoenix American SalesFocus Solutions, providers of the cloud-based MARS CRM, Sales and Marketing Reporting and 22c-2 Compliance Management solutions for banks, insurance companies, asset management firms and other financial service organizations. The Phoenix American aircraft group, including its Irish subsidiary, PAFS Ireland Limited, provides managing agent services for asset backed securitizations specializing in the commercial aircraft and engine leasing industry. Phoenix American Incorporated has five offices worldwide. The Company was founded in 1972 and is headquartered in San Rafael, CA.



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