



PHOENIX AMERICAN
FINANCIAL SERVICES, INC.

PHOENIX AMERICAN FINANCIAL SERVICES ANNOUNCES NEW CLIENT PARTNERSHIP WITH FORUM PARTNERS.

January, 22th 2020

SAN RAFAEL, CA – Phoenix American Financial Services, Inc. (“Phoenix”) is pleased to announce its new client partnership with Forum Partners (“Forum”). Phoenix will support Forum with its full fund administration services suite including fund accounting as well as its industry leading investor services platform. Forum will benefit from Phoenix American’s combination of advanced technology, focus on customer service and long experience with the unique operational requirements of specialized alternative investment funds.

Based in Old Greenwich, CT, Forum invests in and alongside specialized middle market real estate companies with a demonstrated ability to add value. Forum’s expertise is in tailoring financial and strategic solutions for partners and driving growth by identifying catalysts to unlock asset and enterprise value. Forum partners with public and private companies, underwriting the sponsor and the real estate. Each investment is approached from a multi-asset class perspective with the goal of aligning interests and prioritizing downside mitigation before focusing on upside potential. Investments typically include a current income component and an equity cushion. Forum maintains a local presence in the geographies in which the company invests. Its strategy seeks to form exclusive relationships with seasoned sector focused real estate operating companies with scalable strategies.

As the sophistication of alternative real estate funds increases along with regulatory requirements, more funds turn to Phoenix American’s suite of advanced operational solutions. Phoenix has combined the most efficient systems in alternative investments with time tested back office

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processes since its origins as a fund sponsor beginning in 1972. Phoenix American's industry leading STAR-XMS transfer agent system reflects the Company's experience as a fund sponsor and its decades of experience as an administrator for alternative investment funds.

Russell Platt, Chief Executive Officer of Forum Partners, commented: "We look forward to working with Phoenix American Financial Services as we launch Forum Global Investments, LP. We have worked with Phoenix previously and received superior customer service for our investors. We are confident that Phoenix American's technology and commitment to customer service can support our current and future needs."

"Forum Partners is a world class fund sponsor with an impressive ability to unlock asset value for investors," said Andrew Constantin, Senior Vice President, Operations for Phoenix American. "It has been our pleasure to work with Forum in the past and we look forward to supporting this next phase in the firm's history of investment success."

Phoenix American Financial Services, Inc. provides back office outsourcing, fund administration services and sales and marketing reporting to companies in the alternative investment industry. The Company is an affiliate of Phoenix American Incorporated along with Phoenix American SalesFocus Solutions. The Phoenix American aircraft group, including its Irish subsidiary, PAFS Ireland Limited, provides managing agent services for asset backed securitizations in the commercial aircraft and engine leasing industry. Phoenix American has five offices worldwide, was founded in 1972 and is headquartered in San Rafael, CA.