

PHOENIX AMERICAN FINANCIAL SERVICES ANNOUNCES NEW CLIENT, TRILINC GLOBAL ADVISORS LLC.

SAN RAFAEL, CA – Phoenix American Financial Services (“Phoenix”) is pleased to announce its new fund services contract with TriLinc Global Advisors LLC (“TriLinc”). Phoenix will support TriLinc with both transfer agent and fund accounting services. TriLinc will benefit from Phoenix’s combination of advanced technology, commitment to customer service and long experience with the unique requirements of alternative investment funds.

Based in Manhattan Beach, CA, TriLinc is a sponsor of impact investment funds or ESG (environmental, social and governance) funds that enable investors to use their private capital to make a positive social impact, without compromising investment returns. TriLinc’s impact investment strategy provides capital and growth to the companies, regions and people who need it most. Investment targets are in select lower risk, high-growth economies with stable political climates and reliable legal systems. Current TriLinc impact fund investments are in Latin America, Southeast Asia, Sub-Saharan Africa, and Emerging Europe.

“We’re very excited about the partnership with TriLinc,” said Andrew Constantin, Senior Vice President, Operations at Phoenix. “TriLinc is a fantastic sponsor with seasoned management, focusing on an exciting area of investment. TriLinc’s confidence in Phoenix is continued evidence that shows the breadth of capabilities Phoenix has to support alternative investments in today’s markets.”

With the growing sophistication and variety of alternative investment funds and the increased regulatory compliance they require, advanced and integrated operational solutions are critical to the success of today’s fund companies. Phoenix 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 Phoenix’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.

“We are delighted to have Phoenix American Financial Services as a TriLinc partner,” said Ed Leavitt, Operations & Compliance Manager at TriLinc Global. “As a leader in fund services for Alternative Investments, we are confident in their ability to support our needs with their advanced technology and commitment to outstanding customer service.”

Phoenix American Financial Services, Inc. (“PAFS”) 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 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.



PAFS 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. Phoenix American Incorporated has five offices worldwide. Phoenix American, Inc. was founded in 1972 and is headquartered in San Rafael, CA.



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