

## Suncoast Equity Management Appoints Eric Lynch as Managing Director of Institutional Asset Management

*Alongside his leadership role, Mr. Lynch will join the firm's Investment Committee to help guide long-term strategy and portfolio oversight*

**Tampa, FL – July 29, 2025** – [Suncoast Equity Management](#), a boutique investment management firm with a growing presence in the intermediary distribution space, today announces the appointment of [Eric Lynch](#) as Managing Director of its Institutional Asset Management business. Mr. Lynch will also join the firm's Investment Committee, where he will help shape investment strategy and contribute to portfolio decision-making.

In his role at Suncoast, Mr. Lynch will serve as a member of the portfolio management team for the firm's flagship **Suncoast Select Growth and Suncoast Small to Mid-Cap** portfolios and contribute to the **Suncoast Dividend Growth portfolio**. Additionally, he will lead the firm's institutional channel, overseeing business development, strategy messaging and relationship management. He will play a key role in expanding Suncoast's presence within the intermediary distribution space by cultivating and strengthening partnerships with financial advisors, consultants, and institutional clients. In addition to his leadership role, Mr. Lynch will become a key equity stakeholder in Suncoast, alongside other executives, a step that reflects his deep alignment with the firm's mission and his integral role in shaping its long-term leadership and strategic direction.

"What really sets Suncoast apart is its disciplined, focused investment approach combined with a sincere commitment to building lasting relationships—with both individual investors and institutional partners," said **Mr. Lynch**. "I'm excited to join a team that values integrity and thoughtful decision-making, and to help grow the business while honoring the time-tested principles that have driven Suncoast's success for decades."

Mr. Lynch brings over 20 years of experience in equity research, investment strategy, and institutional client service. He joins Suncoast from Scharf Investments LLC, where he served on the Investment Committee and led strategy communications and business development efforts. At Scharf, he was the primary analyst for companies in the Quality Value Portfolio and contributed to both the Multi-Asset and Global portfolios. Early in his tenure at Scharf, he managed the Quality Growth portfolio for several years. He is a frequent guest on CNBC, Bloomberg and Reuters, among other media outlets, and has been quoted often in The Wall Street Journal and Barron's.

He will continue to serve on the Scharf Advisory Board until further notice to ensure a smooth transition and foster continued collaboration between the two firms. Earlier in his career, Mr. Lynch founded and led Lynch Capital Management LLC, a registered investment advisory firm where he followed a quality growth strategy. He also held roles as co-chief operating officer, portfolio manager, and research analyst at Polen Capital Management.

Leveraging his deep industry experience, Mr. Lynch will collaborate closely with the investment team to identify opportunities, strive to enhance portfolio construction, and ensure alignment with the firm's disciplined investment philosophy. His leadership is expected to drive growth, foster client trust, and support Suncoast's commitment to delivering tailored investment solutions that help meet the evolving needs of its diverse client base.

“We are excited to welcome Eric to our leadership team,” said [Donald R. Jowdy, Founder and Chief Investment Officer of Suncoast Equity Management](#). “We first worked closely together at Polen Capital with David Polen and have been friends for 20 years. His deep expertise in quality-oriented investing and commitment to long-term client success align perfectly with our firm’s mission. I am confident that the addition of Eric will strengthen our investment process and enhance the value we deliver to our clients.”

Mr. Lynch’s appointment follows [the firm’s recent launch](#) of its first actively managed exchange-traded fund (ETF), the [Suncoast Select Growth Fund](#) (NYSE: SEMG), which began trading in May. The ETF represents a significant milestone for Suncoast as it broadens access to its time-tested investment strategy through a modern, tax-efficient vehicle. With SEMG and the continued expansion of its institutional intermediary business, Suncoast is strengthening its platform to meet growing demand from advisors and institutions. Mr. Lynch’s leadership will be instrumental in supporting this next phase of growth while reinforcing the firm’s commitment to delivering disciplined, research-driven investment solutions.

For more information about Suncoast Equity Management, please visit [www.suncoastequity.com](http://www.suncoastequity.com).

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### **About Suncoast Equity Management**

Founded in 1997, Suncoast Equity Management is a Tampa-based investment management firm specializing in long-term portfolio strategies and comprehensive wealth planning. Through its proprietary Disciplined Investment System (SEM-DIS), Suncoast Equity Management strives to deliver consistent, research-driven results for individuals, families, and institutional partners. With a commitment to transparency, partnership, and performance, Suncoast Equity Management helps clients build and preserve lasting wealth. To learn more, please visit [www.suncoastequity.com](http://www.suncoastequity.com).

Important Information

***Investments involve risk. Principal loss is possible.***

**The Fund’s investment objectives, risks, charges and expenses must be considered carefully before investing. This and other important information is contained in the prospectus, which may be obtained by following the links [Prospectus](#) and [Summary Prospectus](#) or by calling +1.813.963.0502. Please read the prospectus carefully before investing.**

**An investment in the Fund involves risk. There is no assurance that the Fund will achieve its investment objective. An investor may lose money by investing in the Fund. The following are the principal risks of investing in the Fund.**

The Fund is actively managed and is subject to the risk that the strategy may not produce the intended results. The Fund is new and has a limited operating history to evaluate.

**Large-Capitalization Companies Risk.** The stock of large-capitalization companies may trail the returns of the overall stock market, both in the long and short term.

**Growth Investing Risk.** The stock of growth companies may be more volatile than other types of investments, both in the long and short term.

**Value Style Investing Risk.** Investing in value stocks presents the risk that the stocks may not achieve their full market value.

**Mid-Capitalization Companies Risk.** Investing in the stock of mid-capitalization companies involves greater risk, generally, than that associated with investing in larger, more established companies. The stock may be more volatile and less liquid and be more sensitive to changing market conditions.

**New Fund Risk.** The Fund is a recently organized investment company with no operating history. As a result, investors have no track record or history on which to base their investment decisions.

The Fund is distributed by Quasar Distributors, LLC. The fund's investment advisor is Empowered Funds, LLC, which is doing business as ETF Architect. Suncoast Equity Management serves as the Sub-adviser to the Fund. Quasar is not affiliated with ETF Architect or Suncoast Equity Management.

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