



**FOR IMMEDIATE RELEASE**

## **JonesTrading and Boldwater Form Strategic Relationship**

**(Los Angeles and New York: September 28, 2022)** JonesTrading Institutional Services LLC (“JonesTrading”), a leading global banking and brokerage, today announced a strategic relationship with Boldwater Partners LLC (“Boldwater” or “Boldwater Partners”).

Boldwater is led by CEO and founder John Finn, an industry veteran who has decades of substantial industry expertise and experience as a trusted advisor to leading fund sponsors and institutional investors. Prior to launching Boldwater he was Global Head of Hedge Fund & Alternative Credit Distribution at Eaton Partners (“Eaton”), a wholly owned subsidiary and affiliate of Stifel Financial Corp. In that role, he led Eaton’s hedge fund practice that represented more than 25 different fund managers and raised over \$5 billion in assets during his tenure.

Specific to JonesTrading, there is anticipated near- and long-term client demand for JonesTrading’s Capital Introduction Services. To accommodate this demand and to prepare for the continued growth of the already strong franchise, Boldwater and Mr. Finn will consult and advise JonesTrading on the development and implementation of these Capital Introduction Services. Mr. Finn’s focus will be on operations and developing processes and structure, along with communicating these services to both the institutional investment community and clients of JonesTrading.

The Capital Introductions Group facilitates introductions across JonesTrading institutional clients, including its prime brokerage, outsourced trading, and its agency relationships. Capital Introduction also represents cross-selling opportunities into JonesTrading’s diversified services.

Alternately, JonesTrading will support Boldwater Partners’ broker-dealer activities, which will include primary capital placement, direct sponsor-led transactions, general partner solutions, secondaries, and co-investments for premier alternative asset managers. Mr. Finn’s Boldwater services will be additive to the already robust JonesTrading’s service suite.

With deep expertise that spans private equity, hedge funds, private credit, real assets, and commodities, Boldwater Partners will seek to identify and source exceptional investment opportunities and simultaneously provide partner clients with guidance and execution in all aspects of capital formation and strategic direction. Client alignment will be

paramount for Boldwater Partners, with intentions to invest alongside its clients, both directly and as a significant portion of the firm's fees.

Said Jeff LeVeen, Global Head of Outsourced Trading: "Capital Introduction is an essential offering demanded by our global institutional client base. Our goal is to maximize their experience by having comprehensive services available at JonesTrading - outsourced trading, prime brokerage, electronic capability, and cap intro. Boldwater and John Finn will facilitate rapid operational capability to meet that need as we scale. Additionally, Boldwater represents an opportunity for JonesTrading to pursue a potential expansion into private fund placement and partner with a proven industry expert."

Said John Finn, CEO of Boldwater Partners LLC: "JonesTrading is the premier relationship-based liquidity provider in the space. Relationships, and alignment of those relationships, are also the basis of Boldwater's placement business and core to the firm's ability to execute for both clients and investors alike. That shared focus on relationships and alignment will result in an enhanced client experience for both organizations."

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### **About JonesTrading**

For almost 5 decades JonesTrading has focused on creating liquidity and trading blocks for institutions around the world. Our unique position in the marketplace has enabled us to gain the trust of and establish deep relationships with institutional and corporate clients. We have leveraged our success by expanding our services into additional award-winning offerings. Today JonesTrading is a highly differentiated independent broker-dealer and investment bank providing a wide range of services including: Equity Trading, Derivatives Trading, Outsourced Trading, Electronic Trading, Investment Banking/Capital Markets, Prime Services, Private Markets Trading, as well as Research /Market Intelligence. Member FINRA and SIPC.

### **About Boldwater Partners LLC**

Boldwater Partners is an independent placement agent and alternative asset advisory firm specializing in capital formation, strategic development, and liquidity solutions for premiere asset managers across all alternative asset classes. With deep expertise that spans private equity, hedge funds, private credit, real assets, and commodities, Boldwater Partners strives to identify and source exceptional investment opportunities and simultaneously provide partner clients with guidance and execution across primary capital placement, direct transactions, general partner solutions, secondaries, and co-investments. Client alignment is paramount for Boldwater Partners, with a significant portion of the firm's fees invested with, and alongside, our clients.

### **For Further Information, contact:**

Terrence Mulry, Mulry Consulting LLC, 917.860.8137, [tmulry@outlook.com](mailto:tmulry@outlook.com)