

## Meketa Capital Welcomes Additional Equity Owners, Board Members

*Firm Also Announces Name Change of Primark Private Equity Investments Fund  
To Primark Meketa Private Equity Investments Fund*

**BOSTON, February 22, 2024** – Meketa Capital, LLC (“Meketa Capital”), a newly-launched subsidiary of Meketa Investment Group focused on delivering private markets investment solutions to financial intermediaries and their clients, today announced additional equity ownership in the firm and the appointment of several individuals to the firm’s Board.

Effective February 1, Meketa Capital has entered into an agreement with East Bay Merchant Partners, the investment arm of the Widger family office. In this agreement, Ashley Widger, through the entity AEW, has become an equity owner and growth capital provider to Meketa Capital. In addition, Michael Bell, CEO of Meketa Capital, has become an equity owner of the firm, effective February 1. Meketa Investment Group continues as majority owner of Meketa Capital.

Formally launched earlier this year, Meketa Capital markets and distributes investment services and products to Registered Investment Advisors (RIAs) and other financial intermediaries in the retail marketplace. The firm’s offerings include managing and distributing interval funds, and in the future may include delivering model portfolios, managing customized private market fund vehicles, and providing other investment services.

“On behalf of the Widger family office, I am thrilled to become a stakeholder in Meketa Capital and to help contribute to the firm’s continued growth,” said Ms. Widger. “With its deeply experienced investing team and private markets expertise, Meketa is ideally suited to help individual investors access private markets opportunities via the RIA channel. I look forward to working closely with Michael Bell and the entire Meketa Capital team to grow the firm’s product offering and further expand its RIA relationships, with the goal of helping additional individual investors achieve their investment objectives.

In her new role, Ms. Widger has appointed her father and business partner, Chuck Widger, as a member of Meketa Capital’s Board. Mr. Widger founded and ran Brinker Capital for more than 30 years, growing the firm into a \$26 billion full-service investment management company. Mr. Widger stepped down from that role following Brinker Capital’s 2020 merger with Orion Advisor Solutions. Noreen Beaman and Phil Green, former CEO and CFO, respectively, of Brinker Capital, will serve as advisors to the Meketa Capital Board.

“These changes solidify our long-term strategic plan by ensuring the firm has the financial resources and experienced team to be a leader in expanding access to private markets investing for financial intermediaries and their clients” said Michael Bell, CEO, Meketa Capital. “I am confident that Meketa Capital is positioned to even more effectively and efficiently serve the financial advisor community and to meet the needs of today’s sophisticated individual investor.”

In addition to expanding its equity ownership and welcoming new Board members, Meketa Capital has furthered its affiliation with privately held registered investment advisor Primark Capital, announcing that the Primark Private Equity Investments Fund has been renamed as the Primark Meketa Private Equity Investments Fund, effective January 1. The change reflects Primark’s deeper strategic relationship with Meketa. The continuously offered closed-end interval fund is designed to provide exposure primarily to the



middle market segment of the private equity asset class and aims to provide exposure primarily to the middle market segment of the private equity asset class and aims to provide exposure to privately held companies that have recurring revenue and positive cash flow, diversified across geography, industry, vintage year and private equity sponsor. There has been no change to the Fund's investment policy, objective, strategy, CUSIP or mutual fund ticker symbol (PMPEX).

For more information on the Primark Meketa Private Equity Investments Fund, please call 303-529-2200 or email [info@primarkcapital.com](mailto:info@primarkcapital.com).

### **About Meketa Capital**

Meketa Capital is a subsidiary of Meketa Investment Group focused on investment solutions for the advisor marketplace. Meketa Capital markets and distributes investment services and products to RIAs and other advisors in the individual investor marketplace. These products and services may include: managing and distributing interval funds, providing asset allocation for model portfolios, managing customized private market fund vehicles, and providing some general consulting services to advisors.

### **About Meketa**

Founded in 1978, Meketa is an employee-owned, full-service investment consulting and fiduciary management (OCIO) firm. As an independent fiduciary, the firm serves institutional investors in non-discretionary and discretionary capacities. Meketa's collective client assets under advisement represent approximately \$1.8 trillion as of September 30, 2023. For more information, please visit [www.meketa.com](http://www.meketa.com).

### **GENERAL RISKS**

Past performance is not a guarantee nor a reliable indicator of future results. As with any investment, there are risks. There is no assurance that the funds will achieve their investment objectives.

The views and opinions expressed herein are those of senior management and may change at any time with prior notification. This announcement contains information from sources we believe are a reliable source. However, we are not responsible for the accuracy of such information. The information contained on this announcement is not an offer or a solicitation of an offer to purchase or sell any securities mentioned herein. Investors should carefully consider the investment objectives, risks, charges, and expenses before investing. For the Primark Meketa Private Equity Investments Fund, this information may be reviewed through the Prospectus link on the Primark website (<https://primarkcapital.com>) or by calling the Fund toll free at 877.792.0924. For the Meketa Infrastructure Fund, this information may be reviewed through the Prospectus link on the Meketa Investment Group website (<https://meketacapital.com>) or by calling the Fund at 720.697.1010.

Investments in the Funds are subject to, among others, the following risks:

- The Funds are not intended as a complete investment program but rather the Funds are designed to help investors diversify into private market investments.
- The Closed End Funds are a "non-diversified" management investment company registered under the Investment Company Act of 1940.
- Investments in the Funds involve risk. The Funds are new with no significant operating history by which to evaluate its potential performance. There can be no assurance that the Funds' strategies will be successful.



- Shares of the Funds are not listed on any securities exchange, and it is not anticipated that a secondary market for shares will develop.
- Shares are appropriate only for those investors who can tolerate a high degree of risk, and do not require a liquid investment.
- There is no assurance that you will be able to tender your shares when or in the amount that you desire. Although the Funds will offer quarterly liquidity through a quarterly repurchase process, an investor may not be able to sell or otherwise liquidate all their shares tendered during a quarterly repurchase offer.
- The Funds' investments in private equity companies (Primark) and private infrastructure companies (Meketa) are speculative and involve a high degree of risk, including the risk associated with leverage.

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