

## Polen Capital Launches U.S. Small Company Growth Mutual Fund

**BOCA RATON, FL (12/19/2017)** — Polen Capital Management, LLC, a high-conviction growth equity investment adviser with a 28-year track record, announced today that its U.S. Small Company strategy is available to investors via a mutual fund.

The Polen U.S. Small Company Growth Fund (PBSIX) intends to base the management and make-up of the existing U.S. Small Company Growth strategy. The Fund's strategy aims to outperform by investing in stocks of businesses that the adviser believes are positioned to capitalize on long-term growth opportunities and have strong financials, a sustainable competitive advantage. We also focus on the potential for durable five-year earnings growth.

The concentrated small company growth offering provides Polen Capital's time-tested investment philosophy applied to small capitalization companies.

"Launching a pooled investment vehicle increases the accessibility of our Small Company Growth strategy and enables the delivery of our value proposition to clients whom might not be able to access the strategy otherwise," said Stan Moss, Chief Executive Officer of Polen Capital.

Head of the Small Company Growth Team and U.S. Small Company Growth Portfolio Manager Tucker Walsh has managed small cap portfolios and researched small cap companies for more than 25 years and brings a wealth of leadership experience from his roles as CEO and Head of Portfolio Management at Copper Rock Capital.

### **About the Portfolio Manager**

Mr. Walsh joined Polen Capital in 2017. Prior to joining Polen Capital, Mr. Walsh spent 10 years as CEO and Head of Portfolio Management at Copper Rock Capital Partners and nine years as Managing Director and Head of Small Cap Growth Team at State Street Research. He also spent seven years working in research for Cowen & Co., Merrill Lynch & Co., Cowen Asset Management and Chilton Investment Company. Mr. Walsh received a B.A. in Economics from Washington and Lee University.

### **About Polen Capital Management, LLC**

Founded in 1979, Polen Capital is a global investment management firm that provides high value-added, quality growth investment strategies to sophisticated clients around the world. The Firm is committed to attracting experienced, disciplined investment professionals to add value to client portfolios. Polen Capital's Large Company Growth Team based in Boca Raton, Florida oversees a global equities universe of high-quality growth companies and manages the flagship [Focus Growth](#), [Global Growth](#), and [International Growth](#) investment strategies. The Small Company Growth Team based in Boston oversees the U.S. Small Company Growth strategy. Polen Capital's strategies are offered through various investment vehicles to accommodate a broad range of client mandates. For more information on Polen Capital visit [www.polencapital.com](http://www.polencapital.com) and connect with us on [LinkedIn](#).

### **For further information, please contact:**

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Important Disclosures:

**An investor should consider the Fund's investment objectives, risks, charges and expenses carefully before investing. This and other information about the Fund is in the prospectus, a copy of which may be obtained by calling 888-678-6024. Please read the prospectus and summary prospectus carefully before investing.**

An investment in the Fund is subject to risk, including the possible loss of principal amount invested. The Fund may focus its investments from time to time on one or more economic sectors. Securities of small-capitalization companies may be subject to more abrupt or erratic market movements than securities of larger, more established companies. The Fund is non-diversified and may invest a larger portion of its assets in the securities of a single issuer than a diversified fund; thus an investment in the Fund could fluctuate in value more than an investment in a diversified fund. The Fund is a recently formed mutual fund and has a limited history of operations

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