

Pensions & Investments

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CRAIN COMMUNICATIONS

Pensions & Investments BEST PLACES TO WORK IN MONEY MANAGEMENT

★★ 2023 ★★

MULTIYEAR WINNER

2023



2022



2021



2020



2019



2018



2017



2016

MANAGERS WITH 100 TO 499 EMPLOYEES

FIRST PLACE

Polen Capital

Headquarters: Boca Raton, Fla.
AUA: \$64 billion as of June 30
U.S. employees: 207

IN THEIR OWN WORDS:

“A culture of results and belief in going beyond what’s expected has earned Polen Capital P&I’s Best Places to Work in Money Management for the eighth consecutive year. For more than 30 years, Polen Capital has demonstrated an unwavering commitment to its clients, colleagues and community. Embracing a growth mindset, continuous improvement and lifelong learning are fundamental to its culture. In fact, employees state an individual training budget for continuous improvement and learning as one of the things they love most about Polen. Its results-only work environment (ROWE) provides ‘freedom in a framework’ that empowers people to bring their best selves to work. And Boon Health coaching sessions are available to support mental wellness.”

THREE COOL THINGS:

- Partners with Maven, a digital health platform supporting parenthood, which includes reimbursement of up to \$10,000 for fertility, surrogacy, adoption, maternity and menopause expenses, unlimited virtual appointments with healthcare professionals and an extensive library of clinically backed articles and virtual classes.
- Pays 100% of medical, dental and vision premiums for employees and dependents. Also pays a \$75 stipend per month for fitness memberships.
- Offers up to \$5,000 per employee per year in financial gift matching for charitable donations.

EMPLOYEES SAY:

- “Results-only work environment provides autonomy and flexibility. Role matrices clearly define expectations at each level. Top-notch benefits result in fewer salary deductions. Well-designed recruiting process leads to the hiring of a well-rounded staff.”
- “Best culture in the industry. Cares about employees, clients and community. Invests in its people and takes true interest in helping employees grow and develop. Communication is clear, there is a clear vision and purpose, and senior management is accessible.”
- “Culture and collaboration go a long way. When you get to Polen, you quickly realize that those two things create a work environment that makes coming to work enjoyable and rewarding.”

— Bailey McCann



PROUD OF DEI AWARD: Polen Capital staff members marched in Pride parades in Boston and Florida in 2023. The firm took home the Best DEI Initiative of the Year award in 2023, given by With Intelligence to asset managers that have done an exceptional job promoting diversity, equality and inclusion across their businesses.