



2024 Sustainability Report

A Message from our CEO



At our core, we are a purpose-driven firm. That has not changed.

Through all market conditions and amid existing and emerging challenges, our focus on delivering value for our clients, colleagues, and community endures.

In this spirit, we are pleased to share our annual Sustainability Report, which demonstrates how we bring our commitment to life.

Increasing accessibility to our products

Our mission is to preserve and grow client assets to protect and enable their future.

As a long-term partner to our clients, we aim to help our clients achieve their financial goals through an offering of distinctive equity growth and credit solutions. Whether launching new vehicles, such as our ETF suite, or expanding solutions globally, such as our European High Yield strategy, we are extending our reach to enhance the client experience.

Enabling a culture of engagement and learning

To inspire continuous improvement, we read books as a firm throughout the year. Jim Kwik, author of *Limitless*, was our keynote speaker during our firmwide meeting in May. Jim is a widely recognized expert in memory improvement, brain optimization, and accelerated learning. During the presentation, Jim walked us through several exercises to help us implement his strategies in our day-to-day responsibilities.

Our investment in our employees continues to be noticed by the marketplace. We were proudly named one of the "Best Places to Work in Money Management" by Pensions & Investments for the ninth consecutive year¹.

Improving our communities

Giving time and resources to the community and our employees is essential to making a meaningful difference. This year, we proudly supported numerous charitable organizations, including Make-A-Wish, through our 12th annual Golf & Pickleball Tournament. Since partnering with Make-A-Wish, we have raised more than \$3.2 million, granting wishes to more than 725 children. As I've said in the past, nothing compares to the smile on a Make-A-Wish child's face.

I am also proud to share that we donated nearly \$300,000 through our Donor Advised funds, Client Recognition Program, and Employee Matching Gifts Program in 2024.

Thank you for remaining interested in our ongoing efforts to go beyond for our clients, colleagues, and our community.



Stan C. Moss
Chief Executive Officer

¹ Pensions & Investments named Polen Capital in the category of asset managers with 100-499 employees as of December 9, 2024. The Best Places to Work award is managed by Best Companies Group (BCG). There is no cost to participate. BCG is compensated by Polen Capital for advertising and licensing fees. The Best Places to Work Award is managed by Best Companies Group (BCG) and requires participating organizations to complete a two-part process. The first part evaluates workplace policies, practices, and demographics and is worth approximately 25% of the total evaluation. The second part consists of an employee survey to measure the employee experience and is worth approximately 75% of the total evaluation. The combined scores determine the top companies and which companies are included on the list. There is no cost to participate. BCG is compensated by Polen Capital for advertising and licensing fees.

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Polen by the Numbers

\$55Bn

Assets²

55% / 40%

Operating Committee Diversity
/ Advisory Board Diversity³

227

Employees

>725

Wishes granted over 11 years

9 Consecutive
Years

"Best Places to Work in Money
Management" - Pensions & Investments

5

Employee Resource Groups

PRI

Signatory since 2018

As of 12-31-2023.

² Asset figures include discretionary and nondiscretionary assets.

³ Polen Capital defines diverse individuals as women, people of color, members of the LGBTQ+ community, people with disabilities, and veterans. Data is as of 06-30-2025.

Our Why

At the center of everything we do is our “Why”—our purpose as a firm to create lasting value for our clients, colleagues, and our community. Within our Polen offices, we display our “Why Wall,” which showcases some of the people we serve—firefighters who invest in their pension plans, families that put their life savings in one of the Polen strategies, and hardworking employees who invest in their company’s retirement plan.

Our mission and commitment to our clients is to preserve and grow their assets to protect their present and enable their future. This mission is rooted in our philosophy of delivering distinctive growth and income solutions, building concentrated, active portfolios that we believe are competitively advantaged and can compound and outperform over the long term.

Our global workforce is vital to achieving our mission. We strive to create an empowering environment where colleagues can bring their best selves to work. Polen Capital has been recognized as one of the “Best Places to Work in Money Management” by Pensions & Investments each year since 2016. We are intentional about sustaining our culture and how we support, motivate, and reward our talent.

We are actively involved in our local Boca Raton, Boston, London, Abu Dhabi and Hong Kong communities and dedicate ourselves to bettering the places we work and live. Through corporate sponsorship and volunteerism, we believe we have a powerful opportunity to improve the lives of others.

Vision

- To be a global leader in delivering sustainable high value-added investment outcomes to clients worldwide.
- To build an enduring, purpose-driven firm with a long-term mindset and a culture of continuous improvement, autonomy, and trust.

Values

We live by three Core Values:

- **Do the right thing:** Our clients are the reason we are in business. We make every decision with the best interests of our clients, employees, and external partners in mind.
- **Do more than expected:** Excellence, not perfection, is the base; unexpected service and performance is the goal. Going a step further sets us apart from the competition.
- **Respect the individual:** We build trust with both clients and colleagues by acting with integrity and respect. We seek diversity of thought and encourage inclusion through collaboration, recognizing that world-class results are achieved together.

We talk about our vision and values in nearly every firmwide meeting to keep them at the forefront of our minds. Our uncompromising commitment to these principles is key to delivering on our mission to our clients, colleagues, and communities.



Employee Engagement

Setting standards for open communication and transparency

We believe open, transparent communication strengthens internal connections and supports our mission. The management team hosts “Tri-Annual Meetings,” which serve as town hall forums to share business results, people & culture updates, strategic plans, progress on firm goals, and other company-wide announcements. We solicit employee feedback via polling questions during firmwide meetings; stay interviews; internal health surveys; and the annual Best Places to Work questionnaire. We subscribe to the concept of Radical Candor; employees are encouraged care personally and challenge directly.

Employees set individual goals and learning plans in consultation with their direct managers. Performance reviews are conducted twice a year to ensure employees deliver on their objectives. Managers work to identify strengths and areas of development.

Employees receive competitive salaries and bonuses, and all employees share in upside firm performance either through equity ownership, long-term incentive plans (phantom equity), distribution pools, or a firm bonus tied to asset growth and client retention.

The firm funds employer matching 401k and pension plans. Compensation is market-based and designed to fairly reflect an employee’s skill, education, and experience without bias based on gender, ethnicity, or any other characteristics.

We use compensation surveys for industry compensation benchmarks. Our Compensation Committee reviews employee compensation annually, with input from managers, and seeks to ensure fair balance across teams.

Mental and physical well-being support

We provide generous benefit offerings, including 100% employer-paid health insurance and health-saving accounts to offset the cost of doctor visits, prescriptions, and other medical expenses. Polen Capital supports nutrition by offering free daily lunches, snacks, and beverages that are health conscious. Our headquarters facility boasts an onsite fitness center, and all employees can opt in to a monthly fitness reimbursement benefit.

Wellness rooms are also available for nursing parents and religious prayer. Mental health is top of mind, with the firm providing support towards individual counseling and therapy. We offer employees access to a financial planning resource, as well as wellness coaching and family planning services.



Results-Only Work Environment

We operate within a Results-Only Work Environment (ROWE), enabling employees to structure their own approach to work. ROWE focuses on outcomes and accountability rather than the traditional structure of time worked in the office during specific business hours. We offer employees the flexibility to prioritize work and life. All employees have unlimited paid time off.

Promoting a growth mindset

We embrace a growth mindset and encourage each other through dynamic, blended learning activities, practice, and a culture of continuous improvement. All employees receive a \$5,000 annual learning budget for personal or professional development, and progress toward individual learning plans is evaluated during performance reviews.

Polen Capital hosts quarterly, expertly led firmwide learning opportunities on topics reinforcing the common thread that defines the Polen Capital culture: Autonomy, Mastery, and Purpose. The People & Culture team conducts thorough learning needs analyses with each group and team leader to develop and deliver bespoke learning opportunities focusing on technical and interpersonal skills.

We continue to enhance and grow our Polen Learning Hub, giving all Polen employees the opportunity to learn anywhere and anytime.

This user-friendly Learning Management System stores, assigns, tracks, and measures self-directed eLearning activity. The library includes internally developed eLearning courses and carefully curated external content, including selections from Biz Library, SS&C Learning, and more.

Polen fosters a culture of lifelong learning and continuous coaching. Employees are encouraged to share their knowledge through continuous learning, practice, and feedback. For example, our Investment and Distribution teams offer a Mock Presentation Series to mimic client scenarios, practice presentation skills, and educate employees on our products and portfolios. "Culture Club" meets weekly to discuss topical books for our firm and industry.

Employee Recognition

Kudos is our employee recognition platform where employees can acknowledge and celebrate each other for their contributions and accomplishments.

Throughout the year, we also recognize our colleagues for Going Beyond during firmwide calls, and on our Viva platform. We also use Viva to share exciting news about business success stories, personal achievements, promotions, community involvement, and more.

At every firmwide Triannual Meeting, we invite two employees to share their Polen story—a defining moment in their lives and how they came to be part of the Polen family.

These stories serve to inspire and create connections across our community, while recognizing the individual journey of some of our most impressive employees. During a firmwide meeting each year, our senior leadership, including our CEO, spotlight and recognize our colleagues who are celebrating their 10-year anniversary or 25-year anniversary with Polen.

Diversity & Inclusion

We pursue diversity of thought, unique perspectives, and inclusivity

A diverse workforce is essential to fostering our culture of empathy and open-minded collaboration—a culture that supports personal growth and better results. We welcome the diversity that comes from the perspectives of people with different backgrounds and life experiences. We define diverse individuals as women, people of color, members of the LGBTQ+ community, people with varying abilities, and veterans.

Recruitment

Polen Capital is committed to embedding diversity, equity, and inclusion across our business. Driving diversity in talent acquisition begins when a candidate views our job posting which feature an inclusion statement that reads:

Our Inclusion Statement for Job Postings

"Research shows that women and other underrepresented groups tend to apply only if they meet 100% of the criteria. We are committed to leveling the playing field, and we encourage women, men, people of color, veterans, the LGBTQ+ community, and those returning to the workforce to apply for positions even if they do not necessarily check every box outlined in the job description, including education level."

We've done a lot to ensure that Polen's culture is as special and as positive as it is. We have found that at the core of our culture are the type of people that we hire. Looking inward but also forward, we have identified five qualities that embody the "Polen Person" and incorporated them into our interview process. Those qualities encompass: being a purpose-driven individual, accountable, emotionally intelligent, grit, and demonstrating life-long learner qualities. In addition to skills-based hiring, having candidates share a little bit about how these components fit into their day to day, has proven to bring people on board that thrive in Polen's culture.

We are proud to partner with many organizations that work to close the equity gap. These include the Toigo Foundation, the Pat Tillman Foundation, MA LGBTQ Chamber of Commerce, Girls who Invest, Cornell Women in Investing, George Snow, and GAIN UK. Exposing individuals to a career in investment management as early as possible is key to increasing representation in our industry. Several of our investment professionals dedicate time throughout the year to stock pitch judging, coaching, and mentoring various undergraduate and MBA teams—demonstrating our commitment to driving positive change.

Our annual summer intern program includes a diverse set of students entering their final year of undergraduate or graduate school. Interns work closely with their respective teams and share a capstone project of their work, learnings, and recommendations at the close of the summer. Our interns embrace the spirit of volunteerism by engaging with local nonprofits. They also gain access to Polen's senior leadership, mentorship opportunities, and executive presentation skills from our People & Culture team. Interns can be considered for a full-time opportunity upon graduation and have become a strong pipeline of diverse entry-level talent into the organization.

We have introduced a video assessment platform to the early stages of the intern recruiting process to help eliminate bias and create consistent, equitable processes.

Fostering a Culture of Belonging and Inclusion

Our five Employee Resource Groups (ERGs) strive to advance a culture of belonging and ensure our diverse populations are seen, heard, and celebrated. Our ERGs organized several events throughout the year to advance their causes, create a meaningful impact in the community, and promote education. Each ERG has an executive sponsor to help ensure the ERG’s goals are aligned with our firm’s goals.



Polen ERG Events

Employees Building Resources and Community Engagement (EMBRACE)



Multicultural groups and their allies

- For Diversity Awareness Month, Polen employees have participated in fireside chats for open discussion regarding diversity awareness.

- EMBRACE hosts speaker events on occasion; for example, author Alliah L. Agostini hosted a discussion on the origins of the Juneteenth celebration; for Hispanic Heritage Month, EMBRACE welcomed Elisabeth Jackson, President and CEO at Bridge Over Troubled Waters, a Boston-based organization which provides services for homeless, runaway, and at-risk youth.

Women Inspiring Success and Engagement (WISE)



Women and their allies

- WISE members contribute each year to local women’s organizations in both the Boca and Boston areas, such as Women in Distress and Women’s Lunch Place, and organize and participate in drives to empower women and build our community footprint.
- The leadership council organizes events that enable members to foster personal and professional development, including a Whole Life Balance workshop and Self Advocacy Training.
- As a key goal of the group, members foster connections and collaboration across different business units, office locations, and countries by actively participating in various social events.

People Respecting Individuality, Diversity and Equality (PRIDE)



LGBTQ+ individuals and their allies

- Each year, employees across multiple offices represent Polen by walking in various pride month parades.
- PRIDE coordinates quarterly conversations on important LGBTQ+ issues for its members.
- The group organizes speaker events on occasion; for example, for Pride Month, Kylar Broadus, a black man of trans experience, known for his activism in the LGBT and Trans movements shared his story.

Thrive



All individuals

- Supported events like a Wednesday Walking Group in the London office as part of Mental Health Awareness Month.
- Promotes physical activity, financial literacy, and social connection through engaging events such as desk yoga sessions and financial wellness programs like WellCents Education.

Polen Cares



Polen philanthropic efforts

At Polen Capital, we believe that giving time and resources to the community and our employees is essential to making a meaningful difference. Polen Cares, represents the firm's commitment to supporting our global communities. The group aims to enhance our firm's philanthropic efforts by empowering our employees to direct support and service toward causes that are meaningful to them.

Polen Capital has partnered with the Make-A-Wish® Southern Florida foundation since 2007. It is our immense pleasure to have fulfilled 750+ wishes and raised impactful assets through our annual Make-A-Wish® Polen Capital Golf Tournament. Together, Polen and Make-A-Wish® Southern Florida foundation help fulfill the wishes of children with a critical illness between the ages of 2.5 and 18 years old.

Additional volunteering efforts include:



- **Boca Helping Hands:** By spending time at the facility, Polen employees volunteer quarterly and help prepare pantry bags that get delivered to their thousands of clients each month. Boca Helping Hands serves hot meals, distributes thousands of pantry bags at a handful of Palm Beach County locations, and

delivers weekend meals to more than thousands of students from more than a dozen local elementary schools each month.

- **Red Apple School Supplies:** Employees ran a school supply drive to support school systems who do not have adequate school supplies for teachers and their students. Palm Beach County is the 10th largest school district in the nation, and 70% of students in Palm Beach County are estimated to be living at, or below, the poverty line. For these students school supplies are a luxury. Many arrive at school without a single pencil or notebook, unable to participate in day-to-day lessons and activities. Simply put, the need to prepare students to learn, grow, and prepare for a bright future is immense. On average, teachers spend more than \$800+ on their own, to purchase supplies for students that cannot afford them.
- **Pan Mass Challenge:** Polen Capital supported the effort to raise funds for and awareness about cancer research. Employees participated by biking, giving money and volunteering at events. The PMC is a Massachusetts-based bike-a-thon that raises money for the Dana-Farber Cancer Institute, a world leader in adult and pediatric cancer treatment and research. This annual event draws thousands of riders and volunteers, all of whom have a common goal to find a cure for cancer. The PMC is the largest single athletic event fundraiser in the country.
- **United Way:** Employees participated in the Thanksgiving volunteer event to sort/pack meal bags for families in need. Additionally, employees conducted food drive. United Way works with and for communities to build economic prosperity and enable everyone—across races and ethnicities—to share in the knowledge, wealth, and resources available. Polen has volunteered with United Way for over 10 years.



Hestia: Polen has supported Hestia's "Big Day Out" for children that come from homes of domestic abuse, and host Christmas's for refuge homes. Hestia seeks to provide resources for people recovering from domestic abuse, modern slavery, and mental health crises.

Additionally, Polen Cares oversees our employee matching gifts program, client recognition program and our two donor advised funds.

- **Employee Matching Gifts Program:** Polen matches employees' dollar-for-dollar donations to qualifying non-profit organizations (for employee contributions between \$50 and \$5,000 annually).
- **Client Recognition Program:** Polen makes donations to qualifying non-profit organizations on behalf of our long-standing clients.
- **Polen Cares Donor Advised Fund:** Polen managed Donor Advised Fund (DAF) focuses on Polen Cares initiatives that employees may donate to using the Matching Gifts Program.
- **Polen Diversity Donor Advised Fund:** Polen managed Donor Advised Fund (DAF) focuses on diversity efforts that employees may donate to using the Matching Gifts Program. Beneficiaries have included the Pat Tillman Foundation, which invests in military veterans and their spouses through academic scholarships - building a diverse community of leaders committed to serving others, and the George Snow Scholarship Foundation, which provides scholarships and a host of supplementary support and career services for deserving students within the community pursuing higher education.

Industry Involvement

Polen is a member of Diversity Project North America, through which we work alongside our peers to promote a diverse and inclusive asset management industry.

We are also a signatory to the CFA Institute Diversity, Equity and Inclusion Code ("DEI Code"). Launched in February 2022, the DEI Code provides investment industry organizations with an action-oriented and principles-based framework through which to drive measurable and meaningful change concerning diversity, equity and inclusion within their organizations. As a DEI Code signatory, we commit to six Principles that seek to drive DEI progress as it relates to our talent pipeline, staff acquisition, promotion and retention, leadership, influence, and measurement.

Environment

We are committed to minimizing our environmental impact

We strive to be good stewards of the environment and implement office practices that minimize our use of resources. Our Boca Raton headquarters are located at the Lynn Financial Center, a worksite dedicated to sustainable technology and design principles. The Lynn Financial Center is Boca Raton's first commercial office project to be certified LEED® Gold by the U.S. Green Building Council (USGBC). Our Boston office is located in a building that is both Energy Star and LEED® Platinum certified. To conserve energy, our offices have motion lights to turn off automatically when no one is present. Our London office has LED lighting to reduce electricity usage coupled with central heat recovery ventilation for fresh air supply.

We support recycling throughout our offices and offer water filter systems that encourage reusable mugs and cups to reduce single-use items. To recycle IT equipment such as computers, monitors, and printers, we partner with Excess IT Hardware (EIH), an e-waste recycling and social enterprise company. EIH works to refurbish electronics and donate them to charity or foundation organizations when possible.



Governance



Polen Capital is an independently controlled, employee-managed firm, structured as a limited liability company. The current ownership structure is 72% employees, 20% iM Global Partner (passive interest), and 8% Polen Family Holdings (passive interest). Importantly, Polen Capital employees control 100% of the firm.

We are governed by diverse and experienced individuals comprising our leadership committees.

Compliance Program

Our compliance program consists of a compliance policy and procedures manual and an ongoing monitoring process. The manual describes the legal and regulatory requirements applicable to each operational area and business practice of the firm and sets forth policies and procedures designed to prevent, detect, and correct violations of the Investment Advisers Act of 1940. The ongoing monitoring component of the Compliance Program takes a risk-based approach to ensure compliance with the applicable laws and regulations and internal policies and procedures. Our Compliance Program helps us conduct our investment advisory business in compliance with all applicable laws and the highest ethical and professional standards.

Code of Ethics

All employees are held to the standards contained in Polen Capital's Code of Ethics. The Code of Ethics includes policies regarding personal trading (e.g., preclearance and reporting), outside business activities (e.g., directorships), and gifts & business entertainment. In each case, the Code of Ethics seeks to address potential conflicts of interest. Additionally, the Compliance department provides an annual compliance training presentation for all Polen Capital employees and requires each employee to agree to abide by our Code of Ethics on an annual basis. Further, the Compliance department conducts annual and quarterly attestation processes related to pertinent disclosures by employees. All employees are encouraged to participate in and attend educational compliance

seminars, webcasts, and other programs that are deemed to be beneficial by the compliance department.

Data Privacy and Security

Our clients' trust is invaluable to us. We have implemented many measures to safeguard the confidentiality of client information and protect our business from cyberattacks. Our Information & Data Security Program addresses the detection, prevention, and responses to attack, along with testing and monitoring of the effectiveness of key controls, systems, procedures governing our information infrastructure, and third-party due diligence.

We use multi-factor authentication wherever it is available, enterprise-class firewalls for perimeter security, service providers for 24/7 security event monitoring, endpoint protection software on every server and laptop, a phishing testing service, access rights monitoring software, and various vendor-provided tools.

We conduct regular cybersecurity training to educate staff about best practices for protecting systems and client data. Cybersecurity awareness training covers topics such as policy, choosing strong passwords, safe web browsing, and detecting and reporting phishing attempts. We perform cybersecurity testing annually and have engaged a third-party enterprise security consulting firm and information security provider to perform internal and external penetration tests, wireless network, and firewall configuration reviews, and provide recommendations for improvement.

Business Continuity

Polen Capital has a Business Continuity Plan (BCP) to address continuity of operations in the event of an incident impacting the availability of locations, staff, systems, or data. The plan outlines strategies to address immediate, short-term, and long-term interruptions for each critical business function. Our Business Continuity Management team oversees all recovery efforts made by departmental recovery teams, representing the following critical



functions: portfolio management, trading, operations, accounting, human resources, client relations, and compliance. We perform annual disaster recovery tests, and all employees can work remotely in the event of an outage or threat to any Polen Capital office.

Polen Capital's critical business systems are hosted off-site by the relevant system vendor or partner. For example, email is in the Microsoft 365 cloud. We assess the availability plans of each vendor during our due diligence process.

Our Boston and Waltham offices are used as secondary sites in the event of an outage or threat to the Boca Raton office. Sufficient space and capabilities are in place to allow business to continue as usual for staff relocated during a continuity event. Similarly, employees in our other offices could be hosted in Boca Raton if an event adversely impacted their primary office.

Sustainable Investing

We employ a holistic, objective, stakeholder-oriented approach to sustainable investing. Just as we strive to be a high-quality, sustainable firm that creates enduring value for our stakeholders, we seek similar qualities for the companies in our investment portfolios.

We aim to invest in businesses that we believe are positioned to deliver unique value to stakeholders today, and in the future. In our analysis, we focus on business issues we believe to be material to long-term stakeholder interests and the company's financial strength. We believe businesses that thoughtfully balance the interests of key stakeholders while uniquely delivering the value they seek are positioned to deliver sustainable outcomes.

Polen Capital is a signatory to the United Nations-supported Principles for Responsible Investment to demonstrate our commitment to focusing on material sustainability issues in our investment process. We are also a public supporter of the Task Force on Climate-Related Financial Disclosures (TCFD), which aims to promote greater disclosure of climate-related risks, governance, and strategy in the financial system, a CDP Capital Markets Signatory, and a member of the Asian Corporate Governance Association.



Additional information on our approach can be found on our website: [Approach | Polen Capital](#)

Going Beyond with Polen Capital

Polen Capital is a team of experienced investment industry professionals who share an unwavering commitment to our clients, investors, community, and each other. We have been dedicated to serving investors by providing concentrated portfolios of what we believe are the highest-quality companies for more than three decades. At Polen Capital, we have built a culture of results, and in this, an inherent belief in going beyond what's expected for the people and communities we serve.

We adhere to a time-tested process of researching and analyzing companies around the globe—seeking only the best to build highly concentrated portfolios. Then, we invest for the long haul and with a business owner's mindset, giving these companies time to grow.

This information has been prepared by Polen Capital without taking into account individual objectives, financial situations or needs. As such, it is for informational purposes only and is not to be relied on as, legal, tax, business, investment, accounting, or any other advice. Recipients should seek their own independent financial advice. Investing involves inherent risks, and any particular investment is not suitable for all investors; there is always a risk of losing part or all of your invested capital.

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Past performance is not indicative of future results. There can be no assurances that any portfolio characteristics depicted herein shall be replicated in the future.

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