

Pensions & Investments

THE INTERNATIONAL NEWSPAPER OF MONEY MANAGEMENT

Pensions & Investments
**BEST
 PLACES
 TO WORK**
 IN MONEY MANAGEMENT

★ ★ 2021 ★ ★

**MULTI-YEAR
 WINNER**

2020



2019



2018



2017



2016

MANAGERS WITH 100 TO 499 EMPLOYEES

FIRST PLACE

Polen Capital Management

Headquarters: Boca Raton, Fla.

AUM: \$73 billion as of June 30

Employees: 106

IN THEIR OWN WORDS:

“Polen Capital’s sixth-consecutive year ranking in P&I’s Best Places to Work in Money Management is a clear example of the firm’s strong emphasis on culture. Despite rapid growth in both assets and talent, the firm hasn’t changed its purpose to serve its clients, colleagues and community. A big part of Polen’s culture is operating as a ROWE (results-only work environment); focusing on results and process instead of face time and hours. To promote a healthy lifestyle, Polen Capital provides its employees with an on-site gym and daily catered healthy snacks, breakfast and lunch.”

3 COOL THINGS:

- ▶ As part of its ROWE philosophy, measures team members by performance, not by the number of hours physically spent in the office. Each employee, every day, chooses when, where and how to work best.
- ▶ Pays 100% of medical, dental and vision insurance premiums for employees and dependents. Funds 100% of each employee’s annual deductible and out-of-pocket maximum via a health savings account.
- ▶ Offers free personal training, yoga, massages and meditation sessions in on-site gym; board games in on-site kitchen/dining area for play at lunchtime; and walking treadmill work desks.

EMPLOYEES SAY:

- ▶ “One of my personal favorite benefits is that they cater lunch every day. The ROWE culture makes my work feel as if it is on my own terms and makes everything more enjoyable. Another great thing about Polen Capital is that the executive team regularly eats lunch in the cafeteria and interacts with employees at all levels.”
- ▶ “I joined Polen Capital within the last year and joined during the pandemic/a virtual work environment – the easiness of joining Polen Capital from the processes to the people made it an amazing experience.”
- ▶ “Over the past year, as physical offices were closed due to COVID-19, the organization made sure each employee had the technology and hardware to perform their jobs at home. Also over the past year there were enhancements to benefits, like offering mental health assistance and assistance with child care expenses. Also finally, recently there has been a very strong focus on enhancing diversity and inclusion within the culture of the organization through the hiring of a D&I manager, (and) offering a series of firmwide presentations for Being Black in America; LBGTQ+Allies; Latinx; and Asian.”



FORE! Employees volunteer at the 8th Annual Make-A-Wish Polen Capital Golf Tournament benefiting the Southern Florida chapter. This annual event has raised more than \$1.5 million and helped fulfill more than 300 wishes for children battling critical illnesses.

Profiles written by Rick Baert, Erin Chan Ding, Suzanne Cosgrove, Julie Tatge and Trilbe Wynne.