



## CORE EQUITY

The core equity team is focused on producing an above-average compound rate of return while also protecting capital in down markets. We seek to own high quality businesses that dominate a niche, maintain high barriers to entry, and have consistent demand across an economic cycle. With this dedication to quality, we look at stocks as if we were a potential acquirer of the entire business.

### CORE EQUITY

Our core equity team seeks to invest in companies in sound financial condition with equities priced below our fair value estimate.

#### High Quality Small Cap

27 years \$2,255 mm  
History Assets  
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#### High Quality SMID Cap

15 years \$15,593 mm  
History Assets  
[LEARN MORE](#)

#### High Quality Select Equity

13 years \$1,254 mm  
History Assets  
[LEARN MORE](#)

## CORE EQUITY INVESTMENT PROFESSIONALS



**Chip Reed, CFA**  
Portfolio Manager  
[SEE BIO](#)



**Bill Bell, CFA**  
Portfolio Manager  
[SEE BIO](#)



**Matt Hereford, CFA**  
Portfolio Manager  
[SEE BIO](#)



**Michael Jaje, CFA**  
Investment Specialist  
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### INVESTMENT APPROACH

Our Core Equity team seeks to invest in companies in sound financial condition with equities priced below our fair value estimate.

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