

Invest selectively

For over 100 years, Villere & Co. has crafted customized investment solutions for high net worth individuals and institutional investors with a commitment to highly personal service. We invest selectively and independently, using an active, concentrated portfolio strategy. We consistently apply a disciplined, proven investment process, refined over decades and tested in virtually every market environment.

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WAYS TO INVEST

SEPARATELY MANAGED ACCOUNTS

We offer actively managed account solutions to help meet your investment goals. The separately managed accounts are available exclusively to high net worth individuals and institutional investors who want personalized service and a high degree of portfolio customization. If you're looking for personalization, transparency, and tax efficiency, consider an SMA.

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MUTUAL FUNDS

The Villere Funds provide you access to Villere's investment approach and time-tested strategies in a mutual fund and at a lower entry point. Whether you are accumulating investment assets, rolling over an IRA, or looking for an option for your children's or grandchildren's education fund, consider the Villere Funds to help you meet your goals.

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VILLERE IN THE NEWS

[Fed leaves rates unchanged, could cut soon](#) (Bloomberg Radio's Drive to the Close)



06.19.2019 / NEWS

Expect Fed to set table for rate cut later this year

CNBC'S THE EXCHANGE

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06.03.2019 / NEWS

Buying high-quality businesses that aren't on Wall Street's radar

THE WALL STREET TRANSCRIPT

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[Villere weathers the storm with value stocks](#) ([Bloomberg Radio](#)).

[Investors need to be patient](#) ([Fox Business' Countdown to the Closing Bell](#)).

[Can investors time the market?](#) ([TD Ameritrade Network](#)).

[Lamar Villere talks VISA ahead of earnings](#) ([TD Ameritrade Market on Close](#)).

[Picking stocks in a volatile market environment](#) ([TD Ameritrade Morning Trade Live](#)).

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Team approach

Our nimble, team-based portfolio management approach fosters an open exchange of ideas. With four distinct, multi-generational perspectives collaborating on our best ideas, we rigorously discuss every opportunity and stand behind every investment decision.

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INVESTING WITH YOU

All Villere partners—and generations of family members—invest alongside our clients with our own money. Our success is aligned with yours.

WHO WE SERVE



We manage a variety of assets for individuals and institutions:

- High Net Worth Individuals
- Multi-Generational Families
- Charitable Organizations
- Corporations
- Endowments, Foundations & Other Nonprofits
- Mutual Funds
- Pension Plans
- Profit Sharing Plans
- Retirement Accounts & Plans
- Trusts

In our community

We're honored to work with institutions, families and individuals throughout the Gulf Coast region, building upon our heritage in New Orleans. We are deeply committed to supporting local schools and universities, nonprofits, and cultural institutions through outreach, board leadership, and philanthropic contributions.

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Invest with us

GET STARTED

A mutual fund's investment objectives, risks, charges and expenses must be considered carefully before investing. The statutory and summary prospectuses contain this and other important information about the investment company and may be obtained by calling 866.209.1129 or clicking [here](#). Read carefully before investing.

Mutual fund investing involves risk; loss of principal is possible. Investments in smaller and medium sized companies involve additional risks such as limited liquidity and greater volatility than large cap companies. The Balanced Fund will invest in debt securities. Investments in debt securities typically decrease in value when interest rates rise. This risk is usually greater for longer-term debt securities. Investments in lower rated and nonrated securities present a great risk of loss to principal and interest than higher rated securities. The Equity Fund may invest in foreign securities. Foreign investments involve additional risks, including currency fluctuation, political and economic instability, lack of liquidity and differing legal and accounting standards. These risks are magnified in emerging markets. The Equity Fund's ability to invest in initial public offerings (IPOs) involves a higher degree of risk than more seasoned companies.

[Glossary of Terms](#) contains definitions and additional information.

The Villere Funds are distributed by Quasar Distributors, LLC.

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