



## A Disciplined Approach, Proven Results.

Established in 1994 and registered with the U.S. Securities and Exchange Commission, we are independent money managers for institutional, intermediary and private clients.

Our **investment philosophy** is fundamentally based and time tested. Derived from years of experience, our "edge" is employing an investment process that identifies high quality businesses with shareholder friendly management teams trading at a significant discount to our fair market value estimate.

Risk can be defined a number of ways. We define risk as a permanent loss of capital. With this in mind, we take a focused approach when constructing client portfolios and invest with a long-term, partner mindset. The **investment strategies** we manage are focused in nature and conviction-weighted. We believe value will be realized with time and patience.

*"We identify and invest in high quality companies trading at attractive prices. Over time, this strategy has generated superior risk-adjusted returns relative to our benchmarks and the broader market."*

*- Kevin Bernzott, Founder & Chairman*

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April 12, 2019

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January 16, 2018

[Fourth Quarter 2018 Strategy Overview and Firm Update](#)

October 16, 2018

[Third Quarter 2018 Strategy Overview and Firm Update](#)

July 13, 2018

[Second Quarter 2018 Strategy Overview and Firm Update](#)

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