



**CONGRESS ASSET
MANAGEMENT COMPANY**

Form ADV Part 2B – Brochure Supplement

for

**Daniel A. Lagan, CFA
CEO & CIO**

Effective: March 31, 2024

This Brochure Supplement provides information about the background and qualifications of Daniel A. Lagan, CFA (CRD# **2236297**) in addition to the information contained in the Congress Asset Management, LLP (“CAM” or the “Advisor”) (CRD# **105161**) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the CAM Disclosure Brochure or this Brochure Supplement, please contact us at (617) 428-4300.

Additional information about Mr. Lagan is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Daniel A. Lagan is the Chief Executive Officer, President, and Chief Investment Officer of CAM. Mr. Lagan, born in 1964, is dedicated to advising clients of CAM. He is the chair of the Firm's Management Committee and the Investment Oversight Committee. Additionally, Mr. Lagan is a member of all investment committees ex officio in his role as CIO. Mr. Lagan earned a B.A. from St. Michael's College in 1987. He earned his MBA with a specialization in Finance from Boston College in 1993.. Additional information regarding Mr. Lagan's employment history is included below.

Table 1: Employment History

Congress Asset Management; Chief Executive Officer, Chief Investment Officer	08/2013 to Present
Congress Asset Management; President	07/1999 to 05/2022
Congress Asset Management; Executive Vice President	08/1989 to 06/1999
Price Waterhouse; Auditor	09/1987 to 04/1989
Congress Trust National Association; Executive Vice President & Trust Officer	12/1997 to 11/2009
CW Advisors, LLC (Formerly Congress Wealth Management, LLC); Director	04/2009 to Present

Chartered Financial Analyst ("CFA")

The Chartered Financial Analyst ("CFA") charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charter holders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Mr. Lagan. Mr. Lagan has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Mr. Lagan.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Lagan.***

However, we do encourage you to independently view the background of Mr. Lagan on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching for his full name or CRD# **2236297**.

Item 4 – Other Business Activities

CW Advisors, LLC

Mr. Lagan is a member of the Board of Directors of CW Advisors, LLC. He does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. He is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of

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his time. Daniel A. Lagan does not receive any economic benefit from a non-advisory client for the provision of advisory services.

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Item 5 – Additional Compensation

Mr. Lagan does not have additional business activities where compensation is received. His business activities are detailed in Item 4 above.

Item 6 – Supervision

Mr. Lagan's activities are overseen by the CAM Management Committee and he is subject to the firm's compliance program administered by the CAM Chief Compliance Officer.

CAM has implemented a Code of Ethics and internal compliance that guides each employee in meeting their fiduciary obligations to clients of CAM. Further, CAM is subject to regulatory oversight by various agencies. These agencies require registration by CAM and its employees. As a registered entity, CAM is subject to examinations by regulators, which may be announced or unannounced. CAM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.



**CONGRESS ASSET
MANAGEMENT COMPANY**

Form ADV Part 2B – Brochure Supplement

for

**Christopher M. Lagan, CFA
President**

Effective: March 31, 2024

This Brochure Supplement provides information about the background and qualifications of Christopher M. Lagan, CFA (CRD# **2497190**) in addition to the information contained in the Congress Asset Management, LLP (“CAM” or the “Advisor”) (CRD# **105161**) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the CAM Disclosure Brochure or this Brochure Supplement, please contact us at (617) 428-4300.

Additional information about Mr. Lagan is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

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Item 2 – Educational Background and Business Experience

Christopher M. Lagan is President of CAM. Mr. Lagan, born in 1970, is dedicated to advising clients of CAM. He is a member of the firm's Management Committee, and Investment Oversight Committee. He is also Chair of the Private Equity Investment Policy Committee. Mr. Lagan earned a B.S. in Business Administration from Saint Michael's College in 1992. He earned his MBA from Boston University's Graduate School of Management in January 1999. Additional information regarding Mr. Lagan's employment history is included below.

Table 2: Employment History

Congress Asset Management; President	05/2022 to Present
Congress Asset Management; Managing Director and Chief Operating Officer	08/2013 to 05/2022
Congress Asset Management; Senior Vice President	02/1999 to 08/2013
Congress Wealth Management, LLC; Director	04/2009 to 06/2023
Congress Trust National Association; Vice President and Trust Officer	02/1999 to 12/2005
Congress Asset Management; Research Analyst	02/1997 to 02/1999
Rentex Inc; Purchasing Agent	01/1992 to 12/1993

Chartered Financial Analyst ("CFA")

The Chartered Financial Analyst ("CFA") charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charter holders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Mr. Lagan. Mr. Lagan has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Mr. Lagan.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Lagan.***

However, we do encourage you to independently view the background of Mr. Lagan on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching for his full name or CRD# **2497190**.

Item 4 – Other Business Activities

Mr. Lagan does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. He is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time. He does not receive any economic benefit from a non-advisory client for the provision of advisory service.

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Item 5 – Additional Compensation

Mr. Lagan does not have additional business activities where compensation is received. His business activities are detailed in item 4 above.

Item 6 – Supervision

Mr. Lagan serves as the President of CAM and is supervised by Daniel A. Lagan, the CEO and CIO of the Advisor. Daniel A. Lagan can be reached at (617) 428-4300 or by email at dlagan@congressasset.com.

CAM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to clients of CAM. Further, CAM is subject to regulatory oversight by various agencies. These agencies require registration by CAM and its employees. As a registered entity, CAM is subject to examinations by regulators, which may be announced or unannounced. CAM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.



**CONGRESS ASSET
MANAGEMENT COMPANY**

Form ADV Part 2B – Brochure Supplement

for

**Matthew Terence Lagan, CFA
Vice President, Portfolio Manager**

Effective: March 31, 2024

This Brochure Supplement provides information about the background and qualifications of Matthew Terence Lagan, CFA (CRD# **4345233**) in addition to the information contained in the Congress Asset Management, LLP (“CAM” or the “Advisor”) (CRD# **105161**) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the CAM Disclosure Brochure or this Brochure Supplement, please contact us at (617) 428-4300.

Additional information about Mr. Lagan is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

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Item 2 – Educational Background and Business Experience

Matthew Lagan is a Portfolio Manager at CAM. Mr. Lagan, born in 1973, is dedicated to advising clients of CAM. He is a member of the firm's Management Committee and Investment Oversight Committee. He is Co-Chair of the Large Cap Growth Investment Policy Committee, Chair of the Impact Investing Committee, and a member of the SMid Growth Investment Policy Committee. Mr. Lagan earned a B.S. from Bridgewater State University in 1995. Mr. Lagan earned his MBA from the University of Dublin in 2003. Additional information regarding Mr. Lagan's employment history is included below.

Table 3: Employment History

Congress Asset Management; Vice President, Portfolio Manager	01/2014 to Present
Congress Asset Management; Senior Research Analyst	01/2003 to 01/2014

Chartered Financial Analyst ("CFA")

The Chartered Financial Analyst ("CFA") charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charter holders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Mr. Lagan. Mr. Lagan has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Mr. Lagan.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Lagan.***

However, we do encourage you to independently view the background of Mr. Lagan on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching for his full name or CRD# **4345233**.

Item 4 – Other Business Activities

Mr. Lagan does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. He is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time. He does not receive any economic benefit from a non-advisory client for the provision of advisory service.

Item 5 – Additional Compensation

Mr. Lagan does not have additional business activities where compensation is received. His business activities are detailed in item 4 above.

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Item 6 – Supervision

Mr. Lagan serves as Vice President, Portfolio Manager of CAM and is supervised by Daniel A. Lagan, the CEO and CIO of the Advisor. Mr. Daniel A. Lagan can be reached at (617) 428-4300 or by email at dlagan@congressasset.com.

CAM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to clients of CAM. Further, CAM is subject to regulatory oversight by various agencies. These agencies require registration by CAM and its employees. As a registered entity, CAM is subject to examinations by regulators, which may be announced or unannounced. CAM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.



**CONGRESS ASSET
MANAGEMENT COMPANY**

Form ADV Part 2B – Brochure Supplement

for

**John M. Beaver, CFA
Vice President, Portfolio Manager**

Effective: March 31, 2024

This Brochure Supplement provides information about the background and qualifications of John M. Beaver, CFA (CRD# **4587495**) in addition to the information contained in the Congress Asset Management, LLP (“CAM” or the “Advisor”) (CRD# **105161**) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the CAM Disclosure Brochure or this Brochure Supplement, please contact us at (617) 428-4300.

Additional information about Mr. Beaver is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

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Item 2 – Educational Background and Business Experience

John M. Beaver is a Portfolio Manager at CAM. Mr. Beaver, born in 1969, is dedicated to advising clients of CAM. He is a member of the Investment Oversight Committee, the Intermediate Fixed Income, Intermediate Credit, Core Fixed Income, Short Term Govt/Credit and Small Cap Value Investment Policy Committees. Mr. Beaver earned a B.A. from Colby College in 1992. Mr. Beaver earned his MBA from Babson College in 2002. Additional information regarding Mr. Beaver's employment history is included below.

Table 4: Employment History

Congress Asset Management; Vice President, Portfolio Manager	12/2006 to Present
Congress Asset Management; Credit Analyst	06/2002 to 12/2006
Massachusetts Financial Services Company; Quantitative Research Associate	11/1996 to 08/2002
Fidelity Investments; Performance Analyst	09/1992 to 07/1996

Chartered Financial Analyst (“CFA”)

The Chartered Financial Analyst (“CFA”) charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charter holders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Mr. Beaver. Mr. Beaver has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Mr. Beaver.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Beaver.***

However, we do encourage you to independently view the background of Mr. Beaver on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching for his full name or CRD# **4587495**.

Item 4 – Other Business Activities

John M. Beaver does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. He is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time. He does not receive any economic benefit from a non-advisory client for the provision of advisory services.

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www.congressasset.com

Item 5 – Additional Compensation

Mr. Beaver does not have additional business activities where compensation is received. His business activities are detailed in item 4 above.

Item 6 – Supervision

Mr. Beaver serves as Vice President, Portfolio Manager of CAM and is supervised by Daniel A. Lagan, the CEO and CIO of the Advisor. Mr. Daniel A. Lagan can be reached at (617) 428-4300 or by email at dlagan@congressasset.com.

CAM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to clients of CAM. Further, CAM is subject to regulatory oversight by various agencies. These agencies require registration by CAM and its employees. As a registered entity, CAM is subject to examinations by regulators, which may be announced or unannounced. CAM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.



CONGRESS ASSET
MANAGEMENT COMPANY

Form ADV Part 2B – Brochure Supplement

for

Noel B. Blair, CFA
Vice President, Portfolio Manager

Effective: March 31, 2024

This Brochure Supplement provides information about the background and qualifications of Noel B. Blair, CFA®, (CRD# **5091619**) in addition to the information contained in the Congress Asset Management, LLP (“CAM” or the “Advisor”) (CRD# **105161**) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the CAM Disclosure Brochure or this Brochure Supplement, please contact us at (617) 428-4300.

Additional information about Mr. Blair is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 5091619.

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Phone: (617) 428-4300 Fax: (617) 428-4399
www.congressasset.com

Item 2 – Educational Background and Business Experience

Noel B. Blair is a Portfolio Manager at CAM. Mr. Blair, born in 1978, is dedicated to advising clients of CAM. He is a member of the Small Cap Growth Investment Policy Committee. Mr. Blair attended Cornell University until the year 2000 in pursuit of a degree unrelated to his career in Finance. Since February 2001, he has been employed by Congress Asset Management and has held several positions at the company. Additional information regarding Mr. Blair's employment history is included below.

Table 5: Employment History

Congress Asset Management; Vice President, Portfolio Manager	01/2021 to Present
Congress Asset Management; Investment Analyst	01/2005 to 12/2019
Congress Asset Management; Operations Team Leader	09/2001 to 02/2004

Chartered Financial Analyst (“CFA”)

The Chartered Financial Analyst (“CFA”) charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charter holders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Mr. Blair. Mr. Blair has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Mr. Blair.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Blair.***

However, we do encourage you to independently view the background of Mr. Blair on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# **5091619**.

Item 4 – Other Business Activities

Mr. Blair is not engaged in any other investment-related activities. He does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. He is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time. He does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Congress Asset Management, LLP
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Phone: (617) 428-4300 Fax: (617) 428-4399
www.congressasset.com

Item 5 – Additional Compensation

Mr. Blair does not have additional business activities where compensation is received. His business activities are detailed in item 4 above.

Item 6 – Supervision

Mr. Blair serves as Vice President, Portfolio Manager of CAM and is supervised by Daniel A. Lagan, the CEO and CIO of the Advisor. Mr. Lagan can be reached at (617) 428-4300 or by email at dlagan@congressasset.com.

CAM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to clients of CAM. Further, CAM is subject to regulatory oversight by various agencies. These agencies require registration by CAM and its employees. As a registered entity, CAM is subject to examinations by regulators, which may be announced or unannounced. CAM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.



**CONGRESS ASSET
MANAGEMENT COMPANY**

Form ADV Part 2B – Brochure Supplement

for

**John (“Jack”) Thomas Corrigan,
CFA
Vice President, Portfolio Manager**

Effective: March 31, 2024

This Brochure Supplement provides information about the background and qualifications of John Thomas Corrigan, CFA (CRD# **7888981**) in addition to the information contained in the Congress Asset Management, LLP (“CAM” or the “Advisor”) (CRD# **105161**) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the CAM Disclosure Brochure or this Brochure Supplement, please contact us at (617) 428-4300.

Additional information about Mr. Corrigan is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

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Item 2 – Educational Background and Business Experience

Jack Corrigan is a Portfolio Manager at CAM. Mr. Corrigan, born in 1983, is dedicated to advising clients of CAM. He is a member of the firm's Intermediate Fixed Income, Intermediate Credit, Core Fixed Income, and Short Term Govt/Credit Investment Policy Committees. Mr. Corrigan earned a B.A. from Boston College in 2006. Additional information regarding Mr. Corrigan's employment history is included below.

Table 3: Employment History

Congress Asset Management; Vice President, Portfolio Manager	02/2024 to Present
Congress Asset Management; Vice President, Fixed Income Research & Trading	01/2018 to 02/2024
Congress Asset Management; Fixed Income Trader	06/2011 to 12/2017
Kaufman Rossin Fund Services; Senior Associate	10/2007 to 05/2011
State Street; Custody Fund Accountant	07/2006 to 09/2007

Chartered Financial Analyst (“CFA”)

The Chartered Financial Analyst (“CFA”) charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charter holders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Mr. Corrigan. Mr. Corrigan has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Mr. Corrigan.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Corrigan.***

However, we do encourage you to independently view the background of Mr. Corrigan on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching for his full name or CRD# **7888981**.

Item 4 – Other Business Activities

Mr. Corrigan does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. He is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time. He does not receive any economic benefit from a non-advisory client for the provision of advisory service.

Item 5 – Additional Compensation

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www.congressasset.com

Mr. Corrigan does not have additional business activities where compensation is received. His business activities are detailed in item 4 above.

Item 6 – Supervision

Mr. Corrigan serves as Vice President, Portfolio Manager of CAM and is supervised by Jeffrey R. Porter, Executive Vice President & Director of Fixed Income for the Advisor. Mr. Jeffrey R. Porter can be reached at (617) 428-4300 or by email at jporter@congressasset.com.

CAM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to clients of CAM. Further, CAM is subject to regulatory oversight by various agencies. These agencies require registration by CAM and its employees. As a registered entity, CAM is subject to examinations by regulators, which may be announced or unannounced. CAM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

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**CONGRESS ASSET
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Form ADV Part 2B – Brochure Supplement

for

**E. Martine Elie, CFA
Vice President, Portfolio Manager**

Effective: March 31, 2024

This Brochure Supplement provides information about the background and qualifications of E. Martine Elie, CFA (CRD# **4345533**) in addition to the information contained in the Congress Asset Management, LLP (“CAM” or the “Advisor”) (CRD# **105161**) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the CAM Disclosure Brochure or this Brochure Supplement, please contact us at (617) 428-4300.

Additional information about Ms. Elie is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

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Phone: (617) 428-4300 Fax: (617) 428-4399
www.congressasset.com

Item 2 – Educational Background and Business Experience

E. Martine Elie is a Portfolio Manager at CAM. Ms. Elie, born in 1972, is dedicated to advising clients of CAM. She is Chair of the Dividend Growth Investment Policy Committee. She is a member of the firm's Investment Oversight Committee, Private Equity, Large Cap Growth, and Small Cap Value Investment Policy Committees. Ms. Elie earned her BBA from HEC Montreal in 1994. She earned an MBA with a concentration in Finance from Northeastern in 1999. Additional information regarding Ms. Elie's employment history is included below.

Table 6: Employment History

Congress Asset Management; Vice President, Portfolio Manager	01/2002 to Present
Congress Trust National Association; Vice President and Trust officer	08/2005 to 09/2009
Congress Asset Management; Research Analyst	06/1999 to 01/2002
Credifinance Securities (formerly Majendie Charlton Securities); Analyst	05/1995 to 06/1997

Chartered Financial Analyst (“CFA”)

The Chartered Financial Analyst (“CFA”) charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charter holders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Ms. Elie. Ms. Elie has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Ms. Elie.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Ms. Elie.***

However, we do encourage you to independently view the background of Ms. Elie on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with her full name or her Individual CRD#**4345533**.

Item 4 – Other Business Activities

Ms. Elie is not engaged in any other investment-related activities. She does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. She is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of her time. She does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 5 – Additional Compensation

Ms. Elie does not have additional business activities where compensation is received. Her business activities are detailed in item 4 above.

Item 6 – Supervision

Ms. Elie serves as Vice President, Portfolio Manager of CAM and is supervised by Daniel A. Lagan, the CEO and CIO of the Advisor. Mr. Lagan can be reached at (617) 428-4300 or by email at dlagan@congressasset.com.

CAM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to clients of CAM. Further, CAM is subject to regulatory oversight by various agencies. These agencies require registration by CAM and its employees. As a registered entity, CAM is subject to examinations by regulators, which may be announced or unannounced. CAM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.



CONGRESS ASSET
MANAGEMENT COMPANY

Form ADV Part 2B – Brochure Supplement

for

John G. Fitzgerald, CFA
Vice President, Portfolio Manager

Effective: March 31, 2024

This Brochure Supplement provides information about the background and qualifications of John G. Fitzgerald, CFA (CRD# **2958946**) in addition to the information contained in the Congress Asset Management, LLP (“CAM” or the “Advisor”) (CRD# **105161**) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the CAM Disclosure Brochure or this Brochure Supplement, please contact us at (617) 428-4300.

Additional information about Mr. Fitzgerald is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Congress Asset Management, LLP
2 Seaport Lane, Suite 500, Boston, MA 02210
Phone: (617) 428-4300 Fax: (617) 428-4399
www.congressasset.com

Item 2 – Educational Background and Business Experience

John G. Fitzgerald is a Portfolio Manager at CAM. Mr. Fitzgerald, born in 1964, is dedicated to advising clients of CAM. He is a member of the Private Equity and Small Cap Growth Investment Policy Committees. Mr. Fitzgerald earned a B.A. with a concentration in Finance from the University of Massachusetts in 1986. He earned his MBA from Suffolk University in 1991. Additional information regarding Mr. Fitzgerald's employment history is included below.

Table 7: Employment History

Congress Asset Management; Vice President, Portfolio Manager	06/2001 to Present
Congress Trust National Association; Vice president and Trust Officer	04/2002 to 06/2009
MG Financial; Principal	09/1996 to 06/2001
Gannett Welsh & Kotler; Vice President	08/1994 to 8/1996
Wellington Management Company; Assistant Vice President	01/1989 to 07/1994
Putnam Investor Services; Senior Accountant	09/1986 to 12/1988

Chartered Financial Analyst (“CFA”)

The Chartered Financial Analyst (“CFA”) charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charter holders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Mr. Fitzgerald. Mr. Fitzgerald has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Mr. Fitzgerald.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Fitzgerald.***

However, we do encourage you to independently view the background of Mr. Fitzgerald on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching for his full name or CRD# **2958946**.

Item 4 – Other Business Activities

Mr. Fitzgerald is not engaged in any other investment-related activities. He does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. He is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time. He does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 5 – Additional Compensation

Mr. Fitzgerald does not have additional business activities where compensation is received. His business activities are detailed in item 4 above.

Item 6 – Supervision

Mr. Fitzgerald serves as Vice President, Portfolio Manager of CAM and is supervised by Daniel A. Lagan, the CEO and CIO of the Advisor. Mr. Daniel A. Lagan can be reached at (617) 428-4300 or by email at dlagan@congressasset.com.

CAM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to clients of CAM. Further, CAM is subject to regulatory oversight by various agencies. These agencies require registration by CAM and its employees. As a registered entity, CAM is subject to examinations by regulators, which may be announced or unannounced. CAM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.



CONGRESS ASSET
MANAGEMENT COMPANY

Form ADV Part 2B – Brochure Supplement

for

Keith R. Gontarz, CFA[®]
Portfolio Manager

Effective: March 31, 2024

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of Keith R. Gontarz, CFA[®], (CRD# **5668558**) in addition to the information contained in the Congress Asset Management Company, LLP (“CAM” or the “Advisor,” CRD# **105161**) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the CAM Disclosure Brochure or this Brochure Supplement, please contact us at (617) 428-4300.

Additional information about Mr. Gontarz is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 5668558.

Congress Asset Management, LLP
2 Seaport Lane, Suite 500, Boston, MA 02210
Phone: (617) 428-4300 Fax: (617) 428-4399
www.congressasset.com

Item 2 – Educational Background and Business Experience

Keith R. Gontarz is a Portfolio Manager at CAM. Mr. Gontarz, born in 1984, is dedicated to advising Clients of CAM. Mr. Gontarz earned a B.A. in Finance and Operations Management from University of Massachusetts Amherst in 2007. Mr. Gontarz earned an MBA from Boston College in 2015. Additional information regarding Mr. Gontarz's employment history is included below.

Table 8: Employment History

Congress Asset Management Company, LLP; Portfolio Manager	09/2020 to Present
Congress Asset Management Company, LLP; Investment Analyst	04/2017 to 09/2020
GW&K Investment Management; Senior Client Service Associate	05/2010 to 04/2017
Evergreen Investment/Wells Fargo; Client Service Consultant	10/2007 to 05/2010

Chartered Financial Analyst (“CFA®”)

The Chartered Financial Analyst (“CFA”) charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charter holders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. CFA® is a trademark owned by CFA Institute.

Item 3 – Disciplinary Information

There are no legal, civil or disciplinary events to disclose regarding Mr. Gontarz. Mr. Gontarz has never been involved in any regulatory, civil or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Gontarz.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil or disciplinary events to disclose regarding Mr. Gontarz.***

However, we do encourage you to independently view the background of Mr. Gontarz on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# **5668558**.

Item 4 – Other Business Activities

Mr. Gontarz is dedicated to the investment advisory activities of CAM's Clients. Mr. Gontarz does not have any other business activities.

Item 5 – Additional Compensation

Mr. Gontarz is dedicated to the investment advisory activities of CAM's Clients. Mr. Gontarz does not receive any additional forms of compensation.

Congress Asset Management, LLP
2 Seaport Lane, Suite 500, Boston, MA 02210
Phone: (617) 428-4300 Fax: (617) 428-4399
www.congressasset.com

Item 6 – Supervision

Mr. Gontarz serves as a Portfolio Manager of CAM and is supervised by Daniel A. Lagan, the CEO and CIO of the Advisor. Mr. Lagan can be reached at [\(617\) 428-4300](tel:(617)428-4300) or by email at dlagan@congressasset.com.

CAM has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person in meeting their fiduciary obligations to Clients of CAM. Further, CAM is subject to regulatory oversight by various agencies. These agencies require registration by CAM and its Supervised Persons. As a registered entity, CAM is subject to examinations by regulators, which may be announced or unannounced. CAM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.



CONGRESS ASSET
MANAGEMENT COMPANY

Form ADV Part 2B – Brochure Supplement

for

Brian T. Guild
Vice President, Portfolio Manager

Effective: March 31, 2024

This Brochure Supplement provides information about the background and qualifications of Brian T. Guild (CRD# **5780952**) in addition to the information contained in the Congress Asset Management, LLP (“CAM” or the “Advisor”) (CRD # **105161**) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the CAM Disclosure Brochure or this Brochure Supplement, please contact us at (617) 428-4300.

Additional information about Mr. Guild is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Congress Asset Management, LLP
2 Seaport Lane, Suite 500, Boston, MA 02210
Phone: (617) 428-4300 Fax: (617) 428-4399
www.congressasset.com

Item 2 – Educational Background and Business Experience

Brian T. Guild is a Portfolio Manager at CAM. Mr. Guild, born in 1977, is dedicated to advising clients of CAM. He is also a member of the Intermediate Fixed Income, Intermediate Credit, Core Fixed Income, Short Term Govt/Credit and Impact Investment Policy Committees. Mr. Guild earned a B.S. Economics Finance from Bentley College in 2000. He earned an MBA from Northeastern University in 2011. Additional information regarding Mr. Guild's employment history is included below.

Table 9: Employment History

Congress Asset Management; Vice President, Portfolio Manager	01/2016 to Present
Congress Wealth Management: Portfolio Manager	12/2010 to 03/2017
Congress Asset Management; Research Analyst	05/2008 to 01/2016
Congress Asset Management; Fixed Income Trader	11/2001 to 05/2008
Congress Asset Management; Portfolio Accountant	08/2000 to 11/2001

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Mr. Guild. Mr. Guild has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Mr. Guild.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Guild.***

However, we do encourage you to independently view the background of Mr. Guild on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching for his individual CRD # **5780952**.

Item 4 – Other Business Activities

Mr. Guild is not engaged in any other investment-related activities. He does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. He is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time. He does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 5 – Additional Compensation

Mr. Guild does not have additional business activities where compensation is received. His business activities are detailed in item 4 above.

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Phone: (617) 428-4300 Fax: (617) 428-4399
www.congressasset.com

Item 6 – Supervision

Mr. Guild serves as Vice President and Portfolio Manager of CAM and is supervised by Daniel A. Lagan, the CEO and CIO of the Advisor. Mr. Daniel A. Lagan can be reached at (617) 428-4300 or by email at dlagan@congressasset.com.

CAM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to clients of CAM. Further, CAM is subject to regulatory oversight by various agencies. These agencies require registration by CAM and its employees. As a registered entity, CAM is subject to examinations by regulators, which may be announced or unannounced. CAM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.



CONGRESS ASSET
MANAGEMENT COMPANY

Form ADV Part 2B – Brochure Supplement

for

Nancy T. Huynh
Senior Vice President, Portfolio Manager

Effective: March 31, 2024

This Brochure Supplement provides information about the background and qualifications of Nancy T. Huynh (CRD# 4630095) in addition to the information contained in the Congress Asset Management, LLP (“CAM” or the “Advisor”) (CRD# **105161**) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the CAM Disclosure Brochure or this Brochure Supplement, please contact us at (617) 428-4300.

Additional information about Ms. Huynh is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Congress Asset Management, LLP
2 Seaport Lane, Suite 500, Boston, MA 02210
Phone: (617) 428-4300 Fax: (617) 428-4399
www.congressasset.com

Item 2 – Educational Background and Business Experience

Nancy T. Huynh is a Portfolio Manager at CAM. Ms. Huynh, born in 1973, is dedicated to advising clients of CAM. Ms. Huynh is Chair of the SMid Growth Investment Policy Committee. She is a member of the Large Cap Growth and Multi-Cap Growth Investment Policy Committees. Ms. Huynh earned her undergraduate degree from Colby College in 1996. She earned her ALM in Management with a concentration in Finance, from Harvard University in 2007. Additional information regarding Ms. Huynh's employment history is included below.

Table 10: Employment History

Congress Asset Management; Senior Vice President, Portfolio Manager	2/2023 to Present
Congress Asset Management; Director of Research	5/2014 to 2/2023
Congress Asset Management; Research Analyst	01/2001 to 5/2014
Congress Asset Management; Investment Administrator	01/2000 to 12/2000
Congress Asset Management; Portfolio Accountant	06/1998 to 12/1999
Museum of Science; Membership Relations	08/1996 to 01/1998

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Ms. Huynh. Ms. Huynh has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Ms. Huynh.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. **As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Ms. Huynh.**

However, we do encourage you to independently view the background of Ms. Huynh on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching for her full name or CRD #4630095.

Item 4 – Other Business Activities

Ms. Huynh is not engaged in any other investment-related activities. She does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. She is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of her time. She does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 5 – Additional Compensation

Ms. Huynh does not have additional business activities where compensation is received. Her business activities are detailed in item 4 above.

Item 6 – Supervision

Ms. Huynh serves as Senior Vice President, Portfolio Manager of CAM and is supervised by Daniel A. Lagan, the CEO and CIO of the Advisor. Mr. Lagan can be reached at (617) 428-4300 or by email at dlagan@congressasset.com.

CAM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to clients of CAM. Further, CAM is subject to regulatory oversight by various agencies. These agencies require registration by CAM and its employees. As a registered entity, CAM is subject to examinations by regulators, which may be announced or unannounced. CAM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.



**CONGRESS ASSET
MANAGEMENT COMPANY**

Form ADV Part 2B – Brochure Supplement

for

**Jeffrey K. Kerrigan, CFA
Vice President, Portfolio Manager**

Effective: March 31, 2024

This Brochure Supplement provides information about the background and qualifications of Jeffrey K. Kerrigan, CFA (CRD# **24923389**) in addition to the information contained in the Congress Asset Management, LLP (“CAM” or the “Advisor”) (CRD# **105161**) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the CAM Disclosure Brochure or this Brochure Supplement, please contact us at (617) 428-4300.

Additional information about Mr. Kerrigan is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Congress Asset Management, LLP
2 Seaport Lane, Suite 500, Boston, MA 02210
Phone: (617) 428-4300 Fax: (617) 428-4399
www.congressasset.com

Item 2 – Educational Background and Business Experience

Jeffrey K. Kerrigan is a Portfolio Manager at CAM. Mr. Kerrigan, born in 1971, is dedicated to advising clients of CAM. He is Chair of the Small Cap Value Investment Policy Committee. Mr. Kerrigan earned his B.A. and MBA in Economics from Boston University in 1993. Additional information regarding Mr. Kerrigan's employment history is included below.

Table 11: Employment History

Congress Asset Management; Vice President and Portfolio Manager	09/2017 to Present
Century Capital Management, LLC; Vice President and Portfolio Manager	03/2014 to 09/2017
Haber Trilix; Portfolio Manager and Chief Investment Officer	05/2013 to 03/2014
Ten Asset Management	08/2010 to 05/2013

Chartered Financial Analyst (“CFA”)

The Chartered Financial Analyst (“CFA”) charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charter holders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Mr. Kerrigan. Mr. Kerrigan has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Mr. Kerrigan.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Kerrigan.***

However, we do encourage you to independently view the background of Mr. Kerrigan on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching for his full name or CRD # **2492389**.

Item 4 – Other Business Activities

Mr. Kerrigan serves as a Board Member for a private family office. This activity is separate from Mr. Kerrigan's capacity with CAM. Mr. Kerrigan spends less than 10% of his time at this activity.

Item 5 – Additional Compensation

Mr. Kerrigan has additional business activities that are detailed in item 4 above.

Item 6 – Supervision

Mr. Kerrigan serves as Vice President, Portfolio Manager for CAM and is supervised by Daniel A. Lagan, the CEO and CIO of the Advisor. Mr. Daniel A. Lagan can be reached at (617) 428-4300 or by email at dlagan@congressasset.com.

CAM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to clients of CAM. Further, CAM is subject to regulatory oversight by various agencies. These agencies require registration by CAM and its employees. As a registered entity, CAM is subject to examinations by regulators, which may be announced or unannounced. CAM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.



**CONGRESS ASSET
MANAGEMENT COMPANY**

Form ADV Part 2B – Brochure Supplement

for

**Eric M. Meyers, CFA
Director of Research,
Portfolio Manager**

Effective: March 31, 2024

This Brochure Supplement provides information about the background and qualifications of Eric M. Meyers, CFA (CRD# **7712151**) in addition to the information contained in the Congress Asset Management, LLP (“CAM” or the “Advisor”) (CRD# **105161**) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the CAM Disclosure Brochure or this Brochure Supplement, please contact us at (617) 428-4300.

Additional information about Mr. Meyers is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Congress Asset Management, LLP
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www.congressasset.com

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Phone: (617) 428-4300 Fax: (617) 428-4399
www.congressasset.com

Item 2 – Educational Background and Business Experience

Eric M. Meyers is a Portfolio Manager at CAM. Mr. Meyers, born in 1974, is dedicated to advising clients of CAM. He is a member of the Small Cap Growth Investment Policy Committee and the Impact Investing Committee. Mr. Meyers earned his B.A. from University of Notre Dame in 1996. He earned his MBA with a specialization in Finance from Carnegie Mellon University in 2001. Additional information regarding Mr. Meyers's employment history is included below.

Table 12: Employment History

Congress Asset Management; Director of Research	03/2023 to Present
Congress Asset Management; Portfolio Manager	04/2022 to Present
Congress Asset Management; Research Analyst	09/2017 to 03/2023
Century Capital Management; Equity Analyst	06/2011 to 09/2017
Loomis, Sayles & Company; Equity Analyst	02/2005 to 06/2011
Federated Investors, Inc.; Equity Analyst	09/2001 to 02/2005

Chartered Financial Analyst (“CFA”)

The Chartered Financial Analyst (“CFA”) charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charter holders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Mr. Meyers. Mr. Meyers has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Mr. Meyers.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Meyers.***

However, we do encourage you to independently view the background of Mr. Meyers on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching for his full name or CRD# **7712151**.

Item 4 – Other Business Activities

Eric M. Meyers does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. He is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time. He does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Congress Asset Management, LLP
2 Seaport Lane, Suite 500, Boston, MA 02210
Phone: (617) 428-4300 Fax: (617) 428-4399
www.congressasset.com

Item 5 – Additional Compensation

Mr. Meyers does not have additional business activities where compensation is received. His business activities are detailed in item 4 above.

Item 6 – Supervision

Mr. Meyers serves as a Portfolio Manager of CAM and is supervised by Daniel A. Lagan, the CEO and CIO of the Advisor. Mr. Lagan can be reached at (617) 428-4300 or by email at dlagan@congressasset.com.

CAM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to clients of CAM. Further, CAM is subject to regulatory oversight by various agencies. These agencies require registration by CAM and its employees. As a registered entity, CAM is subject to examinations by regulators, which may be announced or unannounced. CAM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.



**CONGRESS ASSET
MANAGEMENT COMPANY**

Form ADV Part 2B – Brochure Supplement

for

**Amy B. Noyes, CFA
Vice President, Portfolio Manager**

Effective: March 31, 2024

This Brochure Supplement provides information about the background and qualifications of Amy Noyes, CFA (CRD# **2097723**) in addition to the information contained in the Congress Asset Management, LLP (“CAM” or the “Advisor”) (CRD# **105161**) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the CAM Disclosure Brochure or this Brochure Supplement, please contact us at (617) 428-4300.

Additional information about Ms. Noyes is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Congress Asset Management, LLP
2 Seaport Lane, Suite 500, Boston, MA 02210
Phone: (617) 428-4300 Fax: (617) 428-4399
www.congressasset.com

Item 2 – Educational Background and Business Experience

Amy Noyes is a Portfolio Manager at CAM. Ms. Noyes, born in 1968, is dedicated to advising clients of CAM. She is a member of the Mid Cap and Small Cap Investment Policy Committees. Ms. Noyes earned her undergraduate degree from Castleton University in 1990. She earned an MBA from Northeastern University in 1994. Additional information regarding Ms. Noyes' employment history is included below.

Table 13: Employment History

Congress Asset Management; Vice President, Portfolio Manager	05/1998 to Present
Congress Asset Management; Research Analyst	05/1996 to 05/1998
New England Insurance and Investment; Senior Investment Analyst	09/1995 to 05/1996
Fidelity Investments; Research Assistant	09/1994 to 09/1995
Newbury, Piret & Companies, Inc.; Controller & Office Manager	06/1991 to 09/1994

Chartered Financial Analyst (“CFA”)

The Chartered Financial Analyst (“CFA”) charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charter holders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Ms. Noyes. Ms. Noyes has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Ms. Noyes.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Ms. Noyes.***

However, we do encourage you to independently view the background of Ms. Noyes on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching for her full name or CRD# 2097723.

Item 4 – Other Business Activities

Ms. Noyes is not engaged in any other investment-related activities. She does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. She is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of her time. She does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 5 – Additional Compensation

Ms. Noyes does not have additional business activities where compensation is received. Her business activities are detailed in item 4 above.

Item 6 – Supervision

Ms. Noyes serves as Vice President, Portfolio Manager of CAM and is supervised by Daniel A. Lagan, the CEO and CIO of the Advisor. Mr. Lagan can be reached at (617) 428-4300 or by email at dlagan@congressasset.com.

CAM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to clients of CAM. Further, CAM is subject to regulatory oversight by various agencies. These agencies require registration by CAM and its employees. As a registered entity, CAM is subject to examinations by regulators, which may be announced or unannounced. CAM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.



**CONGRESS ASSET
MANAGEMENT COMPANY**

Form ADV Part 2B – Brochure Supplement

for

**Gregg A. O’Keefe, CFA
Executive Vice President, Portfolio Manager**

Effective: March 31, 2024

This Brochure Supplement provides information about the background and qualifications of Gregg A. O’Keefe, CFA (CRD# **2276823**) in addition to the information contained in the Congress Asset Management, LLP (“CAM” or the “Advisor”) (CRD# **105161**) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the CAM Disclosure Brochure or this Brochure Supplement, please contact us at (617) 428-4300.

Additional information about Mr. O’Keefe is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Congress Asset Management, LLP
2 Seaport Lane, Suite 500, Boston, MA 02210
Phone: (617) 428-4300 Fax: (617) 428-4399
www.congressasset.com

Item 2 – Educational Background and Business Experience

Gregg A. O’Keefe is a Portfolio Manager of CAM. Mr. O’Keefe, born in 1960, is dedicated to advising clients of CAM. He is Chair of the Small Cap Growth Investment Policy Committee. Mr. O’Keefe is also a member of the firm’s Management Committee, the Investment Oversight Committee, and the Mid Cap Growth Investment Policy Committee. Mr. O’Keefe completed a B.S. with a concentration in Finance from Boston University. He also earned an MBA from Boston College in 1989. Additional information regarding Mr. O’Keefe’s employment history is included below.

Table 14: Employment History

Congress Asset Management; Executive Vice President	07/1999 to Present
Congress Asset Management; Senior Vice President	05/1986 to 06/1999
Congress Trust National Association; Vice President & Trust Officer	12/1997 to 10/2005
Congress Trust National Association; Vice President	08/1994 to 8/1996
Trustee & Investors Co., Inc.; Analyst	06/1982 to 04/1986

Chartered Financial Analyst (“CFA”)

The Chartered Financial Analyst (“CFA”) charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charter holders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Mr. O’Keefe. Mr. O’Keefe has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Mr. O’Keefe.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. O’Keefe.***

However, we do encourage you to independently view the background of Mr. O’Keefe on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching for his full name or CRD# **2958946**.

Item 4 – Other Business Activities

Mr. O’Keefe is not engaged in any other investment-related activities. Mr. O’Keefe does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. Mr. O’Keefe is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time. Gregg A. O’Keefe does not receive any economic benefit from a non-advisory client for the provision of advisory services.

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2 Seaport Lane, Suite 500, Boston, MA 02210
Phone: (617) 428-4300 Fax: (617) 428-4399
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Item 5 – Additional Compensation

Mr. O'Keefe does not have additional business activities where compensation is received. His business activities are detailed in item 4 above.

Item 6 – Supervision

Mr. O'Keefe serves as Executive Vice President, Portfolio Manager of CAM and is supervised by Daniel A. Lagan, the CEO and CIO of the Advisor. Mr. Daniel A. Lagan can be reached at (617) 428-4300 or by email at dlagan@congressasset.com.

CAM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to clients of CAM. Further, CAM is subject to regulatory oversight by various agencies. These agencies require registration by CAM and its employees. As a registered entity, CAM is subject to examinations by regulators, which may be announced or unannounced. CAM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.



CONGRESS ASSET
MANAGEMENT COMPANY

Form ADV Part 2B – Brochure Supplement

for

John B. O'Reilly, CFA
Senior Vice President, Portfolio Manager

Effective: March 31, 2024

This Brochure Supplement provides information about the background and qualifications of John B. O'Reilly, CFA (CRD# **1694781**) in addition to the information contained in the Congress Asset Management, LLP (“CAM” or the “Advisor”) (CRD# **105161**) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the CAM Disclosure Brochure or this Brochure Supplement, please contact us at (617) 428-4300.

Additional information about Mr. O'Reilly is available on the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Congress Asset Management, LLP
2 Seaport Lane, Suite 500, Boston, MA 02210
Phone: (617) 428-4300 Fax: (617) 428-4399
www.congressasset.com

Item 2 – Educational Background and Business Experience

John B. O'Reilly is a Portfolio Manager of CAM. Mr. O'Reilly, born in 1964, is dedicated to advising clients of CAM. He is Chair of the Multi-Cap Growth Investment Policy Committee. He is also a member of the Investment Oversight Committee, the Mid Cap Growth Investment Policy Committee and the Large Cap Growth Investment Policy Committee. Mr. O'Reilly earned a B.A. from Providence College in 1986. He earned an MBA from Bryant College in 1992. Additional information regarding Mr. O'Reilly's employment history is included below.

Table 15: Employment History

Congress Asset Management; Senior Vice President, Portfolio Manager	06/2001 to Present
Mellon Private Asset Management; Portfolio Manager	07/2000 to 06/2001
State Street Bank & Trust; Vice President	03/1991 to 07/2000

Chartered Financial Analyst ("CFA")

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Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Mr. O'Reilly. Mr. O'Reilly has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Mr. O'Reilly.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. O'Reilly.***

However, we do encourage you to independently view the background of Mr. O'Reilly on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching for his full name or CRD# **1694781**.

Item 4 – Other Business Activities

Mr. O'Reilly is not engaged in any other investment-related activities. He does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. He is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time. He does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 5 – Additional Compensation

Mr. O'Reilly does not have additional business activities where compensation is received. His business activities are detailed in item 4 above.

Congress Asset Management, LLP
2 Seaport Lane, Suite 500, Boston, MA 02210
Phone: (617) 428-4300 Fax: (617) 428-4399
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Item 6 – Supervision

Mr. O'Reilly serves as Senior Vice President, Portfolio Manager of CAM and is supervised by Daniel A. Lagan, the CEO and CIO of the Advisor. Mr. Daniel A. Lagan can be reached at (617) 428-4300 or by email at dlagan@congressasset.com.

CAM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to clients of CAM. Further, CAM is subject to regulatory oversight by various agencies. These agencies require registration by CAM and its employees. As a registered entity, CAM is subject to examinations by regulators, which may be announced or unannounced. CAM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.



CONGRESS ASSET
MANAGEMENT COMPANY

Form ADV Part 2B – Brochure Supplement

for

Jeffrey R. Porter, CFA
Executive Vice President & Director Fixed Income

Effective: March 31, 2024

This Brochure Supplement provides information about the background and qualifications of Jeffrey R. Porter, CFA (CRD# **5096700**) in addition to the information contained in the Congress Asset Management, LLP (“CAM” or the “Advisor”) (CRD# **105161**) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the CAM Disclosure Brochure or this Brochure Supplement, please contact us at (617) 428-4300.

Additional information about Mr. Porter is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Congress Asset Management, LLP
2 Seaport Lane, Suite 500, Boston, MA 02210
Phone: (617) 428-4300 Fax: (617) 428-4399
www.congressasset.com

Item 2 – Educational Background and Business Experience

Jeffrey R. Porter is a Portfolio Manager at CAM. Mr. Porter, born in 1964, is dedicated to advising clients of CAM. Mr. Porter is an Executive Vice President and the Director of Fixed Income of CAM. He is Chair of the Intermediate Fixed Income, Intermediate Credit, Core Fixed Income and Short Term Govt/Credit Investment Policy Committees. He is also member of the firm's Management Committee and the Investment Oversight Committee. Mr. Porter received two Bachelor degrees, Accounting and Business Management, from North Carolina State University in 1987. He also received an MBA from East Carolina University in 1990. Additional information regarding Mr. Porter's employment history is included below.

Table 16: Employment History

Congress Asset Management; EVP & Director Fixed Income	03/2010 to Present
Prelude Asset Management; Co-Founder & Chief Executive Officer	06/2009 to 03/2010
Kellport Capital Management/Crescam Asset Management; Co-Founder	04/2005 to 05/2009
Partners HealthCare Systems, Inc.; Director of Portfolio Management	05/1997 to 04/2005
North Carolina Retirement Systems; Investment Professional	08/1992 to 04/1997
KPMG Peat Marwick; Staff Auditor	08/1987 to 04/1988

Chartered Financial Analyst ("CFA")

The Chartered Financial Analyst ("CFA") charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charter holders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Mr. Porter. Mr. Porter has never been involved in any regulatory, civil, or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Mr. Porter.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Porter.***

However, we do encourage you to independently view the background of Mr. Porter on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching for his full name or CRD# **5096700**.

Item 4 – Other Business Activities

Mr. Porter is not engaged in any other investment-related activities. He does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. He is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time. He does not receive any economic benefit from a non-advisory client for the provision of advisory services.

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www.congressasset.com

Item 5 – Additional Compensation

Mr. Porter does not have additional business activities where compensation is received. His business activities are detailed in item 4 above.

Item 6 – Supervision

Mr. Porter serves as Executive Vice President and Director of Fixed Income for CAM and is supervised by Daniel A. Lagan, the CEO and CIO of the Advisor. Mr. Daniel A. Lagan can be reached at (617) 428-4300 or by email at dlagan@congressasset.com.

CAM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to clients of CAM. Further, CAM is subject to regulatory oversight by various agencies. These agencies require registration by CAM and its employees. As a registered entity, CAM is subject to examinations by regulators, which may be announced or unannounced. CAM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.



**CONGRESS ASSET
MANAGEMENT COMPANY**

Form ADV Part 2B – Brochure Supplement

for

**Todd W. Solomon, CFA
Senior Vice President, Portfolio Manager**

Effective: March 31, 2024

This Brochure Supplement provides information about the background and qualifications of Todd W. Solomon, CFA (CRD# **2272877**) in addition to the information contained in the Congress Asset Management, LLP (“CAM” or the “Advisor”) (CRD# **105161**) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the CAM Disclosure Brochure or this Brochure Supplement, please contact us at (617) 428-4300.

Additional information about Mr. Solomon is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Congress Asset Management, LLP
2 Seaport Lane, Suite 500, Boston, MA 02210
Phone: (617) 428-4300 Fax: (617) 428-4399
www.congressasset.com

Item 2 – Educational Background and Business Experience

Todd W. Solomon, born in 1970, is a Senior Vice President Portfolio Manager of CAM. He is Chair of the Mid Cap Growth Investment Policy Committee. Mr. Solomon is also a member of the Investment Oversight Committee and the Multi-Cap Investment Policy Committee. Mr. Solomon earned a B.S. from Georgetown University in 1992. He earned an MBA from New York University in 1996. Additional information regarding Mr. Solomon's employment history is included below.

Table 17: Employment History

Congress Asset Management; Senior Vice President	04/2001 to Present
Congress Trust National Association; Vice President and Trust Officer	05/2003 to 06/2009
United States Trust Company of Boston; Investment Officer	05/1998 to 02/2001
Fidelity Management & Research Company; Sector Research	08/1996 to 05/1998
The Pioneer Group, Inc.; Assistant Analyst	01/1993 to 08/1994

Chartered Financial Analyst (“CFA”)

The Chartered Financial Analyst (“CFA”) charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charter holders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Item 3 – Disciplinary Information

There are no legal, civil, or disciplinary events to disclose regarding Mr. Solomon. Mr. Solomon has never been involved in any regulatory, civil or criminal action. There have been no client complaints, lawsuits, arbitration claims, or administrative proceedings against Mr. Solomon.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil, or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil, or disciplinary events to disclose regarding Mr. Solomon.***

However, we do encourage you to independently view the background of Mr. Solomon on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching for his full name or CRD# **2272877**.

Item 4 – Other Business Activities

Mr. Solomon is not engaged in any other investment-related activities. He does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products. He is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time. He does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Congress Asset Management, LLP
2 Seaport Lane, Suite 500, Boston, MA 02210
Phone: (617) 428-4300 Fax: (617) 428-4399
www.congressasset.com

Item 5 – Additional Compensation

Mr. Solomon does not have additional business activities where compensation is received. His business activities are detailed in item 4 above.

Item 6 – Supervision

Mr. Solomon serves as Senior Vice President Portfolio Manager for CAM and is supervised by Daniel A. Lagan, the CEO and CIO of the Advisor. Mr. Daniel A. Lagan can be reached at (617) 428-4300 or by email at dlagan@congressasset.com.

CAM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to clients of CAM. Further, CAM is subject to regulatory oversight by various agencies. These agencies require registration by CAM and its employees. As a registered entity, CAM is subject to examinations by regulators, which may be announced or unannounced. CAM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.