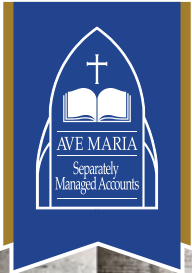


# AVE MARIA

SEPARATELY MANAGED ACCOUNTS



# PRO-LIFE PRO-FAMILY



*We take a pro-life and pro-family approach to investing, with a proprietary screening process examining corporate compliance with Catholic teachings. Specifically, companies engaged in the following are eliminated:*

-  **ABORTION**
-  **PORNOGRAPHY**
-  **EMBRYONIC STEM CELL RESEARCH**
-  **POLICIES UNDERMINING THE SACRAMENT OF MARRIAGE**

*Investments are made only in companies that do not violate core teachings of the Catholic Church as set by our Catholic Advisory Board.*

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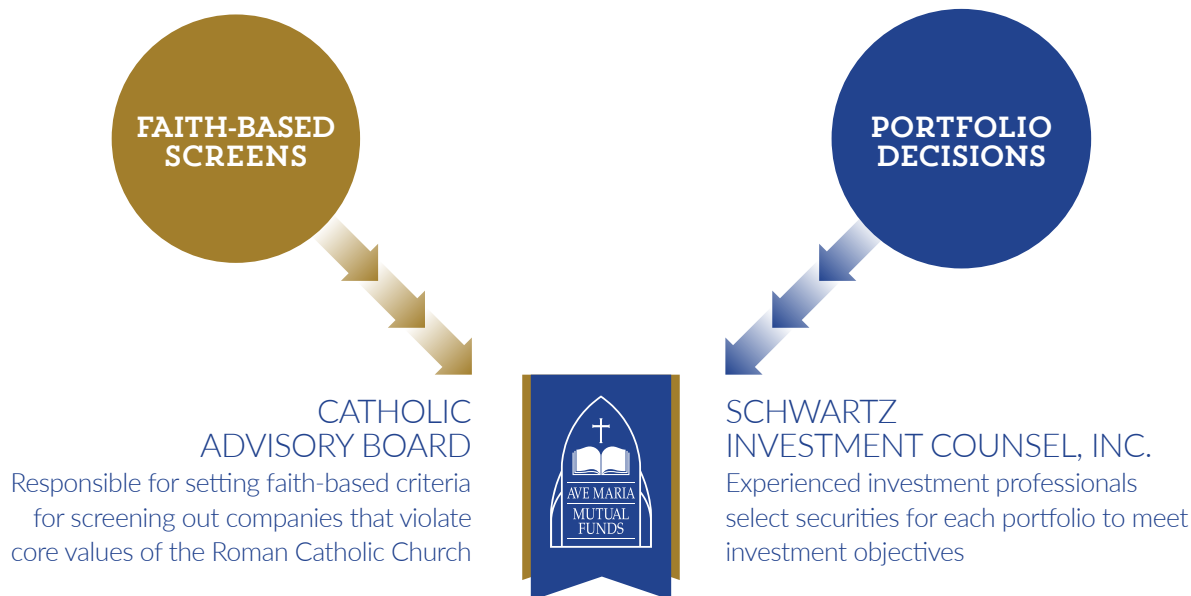
*Former Board Members Who Continue To Lead and Inspire In Spirit*

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|                                                                                                                                     | STRATEGY/INCEPTION                 | GOAL                                                                    | INVESTMENT FOCUS                                                                                                                         | MANAGERS                                             |
|-------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|-------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|
| <div> <div>↑</div> <div>↓</div> <div>           R<br/>I<br/>S<br/>K<br/>/<br/>R<br/>E<br/>T<br/>U<br/>R<br/>N         </div> </div> | <b>Growth Focused*</b><br>5/1/2020 | Long-term capital appreciation                                          | Companies of all sizes offering high earnings growth potential                                                                           | Chadd M. Garcia, CFA                                 |
|                                                                                                                                     | <b>Value Focused</b><br>1/1/1984   | Long-term capital appreciation                                          | Companies of all sizes offering high earnings growth potential at a reasonable price                                                     | Timothy S. Schwartz, CFA<br>George P. Schwartz, CFA  |
|                                                                                                                                     | <b>World Equity</b><br>4/30/2010   | Long-term capital appreciation                                          | Companies of all capitalizations from around the world                                                                                   | Anthony W. Gennaro, CFA, CPA<br>Sean C. Gaffney, CFA |
|                                                                                                                                     | <b>Growth</b><br>5/1/2003          | Long-term capital appreciation                                          | Mid-cap and larger companies offering above-average potential for growth in revenues, profits and cash flow                              | Adam P. Gaglio, CFA<br>Chadd M. Garcia, CFA          |
|                                                                                                                                     | <b>Value</b><br>5/1/2001           | Long-term capital appreciation                                          | Companies of all capitalizations believed to be undervalued relative to their intrinsic worth                                            | Timothy S. Schwartz, CFA<br>Ryan M. Kuyawa, CFA      |
|                                                                                                                                     | <b>Rising Dividend</b><br>5/2/2005 | Long-term capital appreciation and a rising stream of dividend payments | Dividend-paying common stocks                                                                                                            | Brandon S. Scheitler<br>George P. Schwartz, CFA      |
|                                                                                                                                     | <b>Fixed Income</b><br>5/1/2003    | Preservation of principal with a reasonable level of current income     | Primarily domestic investment-grade debt of government and corporate issuers and may invest up to 20% of its assets in equity securities | Brandon S. Scheitler<br>James T. Peregoy, CFA        |

\* Prior to April 28, 2025, the Ave Maria Growth Focused Strategy was named the Ave Maria Focused Strategy

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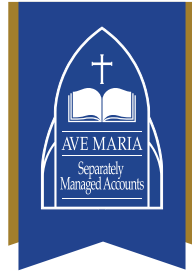
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*Director of Advisory Services*



**ROBERT M. GEPPNER**  
*Director of Strategic Planning*

# AVE MARIA

SEPARATELY MANAGED ACCOUNTS



Ave Maria Value Strategy

Ave Maria Growth Strategy

Ave Maria Rising Dividend Strategy

Ave Maria World Equity Strategy

Ave Maria Growth Focused Strategy

Ave Maria Value Focused Strategy

Ave Maria Fixed Income Strategy

For additional information,  
contact your financial professional, or call

**1-800-449-9240**