

About Us

Quick Firm Facts

Year Founded	1997
AUM	\$9.9B
# of Professionals	60-65

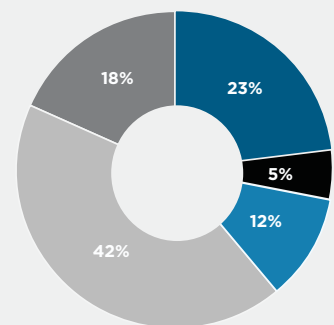
Investment Teams



While they benefit from the scale of Chartwell, our five investment teams operate with complete autonomy. Each team has its own fundamental research process which shapes their independent investment views.

The teams also take a unique approach to portfolio construction which results in a wide range of solutions based investment strategies.

% OF AUM BY INVESTMENT TEAM



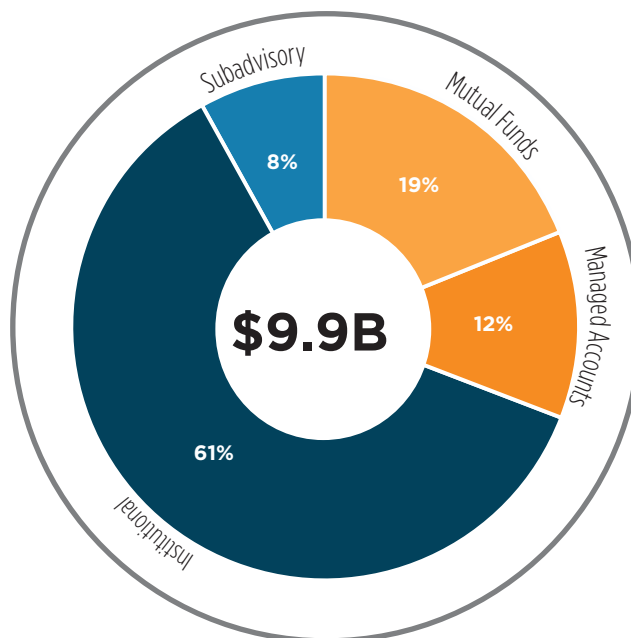
- VALUE EQUITY
- GROWTH EQUITY
- BALANCED
- FIXED INCOME
- LARGE CAP

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Chartwell manages active equity, fixed income and balanced strategies for institutional and advisory clients via separate accounts, sub-advisory relationships and mutual funds. We are proud of the deep relationships we have built with our clients, consultants and distribution partners over the past 20 years.

Located in Berwyn, PA, since its founding in 1997, Chartwell has successfully grown into a 60+ person boutique investment management firm with approximately \$9.9 billion of assets under management. Chartwell is a wholly-owned subsidiary of TriState Capital Holdings, Inc., a publicly held bankholding company based in Pittsburgh, Pa. Chartwell is also advisor to the Chartwell family of funds which includes the Berwyn Income Fund.



SEPARATE ACCOUNTS

- Dividend Value
- Large Cap Growth
- Small Cap Value
- Small Cap Growth
- Small Mid Cap Value
- Mid Cap Value
- Mid Cap Growth
- Intermediate Fixed Income
- Core Fixed Income
- Short Duration Fixed Income
- Short Duration Corporate Fixed Income
- Short Duration BB High Yield Fixed Income
- High Yield Fixed Income

MUTUAL FUNDS

- Small Cap Value Fund (CWSIX)
- Small Cap Growth Fund (CWSGX)
- Mid Cap Value Fund (BERCX)
- Berwyn Income Fund (BERIX)
- Short Duration High Yield Fund (CWFIX)

Institutional Sales Team

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YOU SHOULD CAREFULLY CONSIDER THE INVESTMENT OBJECTIVES, POTENTIAL RISKS, MANAGEMENT FEES, AND CHARGES AND EXPENSES OF THE FUNDS BEFORE INVESTING. THE FUNDS' PROSPECTUS CONTAINS THIS AND OTHER INFORMATION ABOUT THE FUNDS, AND SHOULD BE READ CAREFULLY BEFORE INVESTING. YOU MAY OBTAIN A CURRENT COPY OF THE FUNDS' PROSPECTUS BY CALLING 888-995-5505.

MUTUAL FUND INVESTING INVOLVES RISK, INCLUDING THE POTENTIAL LOSS OF PRINCIPAL.

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Chartwell Investment Partners LLC, is an investment management firm dedicated solely to the investment advisory business. Chartwell's philosophy is to rely on proprietary, bottom-up research to find high quality investments across its various product offerings.