



## Copeland Capital Management Celebrates \$1 Billion in AUM

Conshohocken, PA - January 9, 2014 - Copeland Capital Management is pleased to announce that it has passed a significant milestone with over \$1 Billion in assets under management.

“While today’s announcement is an important landmark in the growth of our firm, we are really just getting started,” stated Eric Brown, Copeland’s Founder and Chief Executive Officer. “When we began our business development efforts three years ago, we managed just \$100 million. Since then, we have had great success in educating the marketplace about the effectiveness of a Dividend Growth approach to investing across clients’ entire portfolios.”

“There is a general misconception in the marketplace that Dividend Growth is purely a domestic, large cap phenomenon,” added Mark Giovanniello, Copeland’s Chief Investment Officer. “While we are extremely proud of our domestic large cap product, our research and our performance show that it pays to appreciate the historically strong returns and lower risk of Dividend Growth companies across all capitalization ranges, both in the United States and Internationally. As a result, in recent years, we have expanded our offerings to include small and mid cap domestic strategies, a domestic long-short hedge fund, an international strategy, and both domestic and international tactical strategies.”

Giovanniello continued, “By focusing on companies that have consistently increased their dividends, we partner with management teams that have demonstrated the ability to be disciplined allocators of shareholder capital. As a result, we believe we increase our hit rate of investment success. We also believe this results in limiting the incidence of severe declines in individual stocks, allowing our strategy to deliver a far more predictable and less volatile return pattern than other styles of investing that ignore the predictive power of Dividend Growth. At the same time, we think we can better participate in rising markets than other “defensive” strategies, because the rising dividend stream drives capital appreciation within our portfolio of stocks. This approach has allowed us to differentiate ourselves in areas such as small cap and mid cap, where people are accustomed to accepting much higher levels of risk for the potential of higher returns. We suggest, and the returns of our strategies have demonstrated, that one can outperform with substantially less risk by focusing purely on companies with consistent Dividend Growth.”

“As successful as we have been, we feel our best days are ahead of us. While we have delivered strong returns, the last few years have been challenging for our style of investing. If market returns moderate, as we expect they might going forward, the likelihood that we will outperform should only increase,” added Eric Brown.

“Our growth has been driven by more than just strong returns,” noted Chuck Barrett, Director of Sales for Copeland. “Our business model, which employs one philosophy and process across all capitalization ranges in domestic, international and alternative strategies, has proven very attractive in the marketplace. Moreover, the fact that our strategies can be accessed in Separate Account, Model Delivery, Mutual Fund, and Hedge Fund formats, has been an important contributor to our early success. We are fortunate to have been awarded significant institutional and sub-advisory mandates, while our mutual funds have been very well received in the RIA and Broker Dealer channels. Our model allows us to have the same conversation whether we are meeting with a plan sponsor, a consulting firm, or a platform research group at a broker dealer. Rather than trying to sell a product, we spend our time with clients and prospective investors discussing the merits of Dividend Growth. This approach ultimately allows them the choice of which strategy or vehicle type they would prefer in order to access our expertise.”

*Past performance is not indicative of future results.*

### About Copeland Capital Management

Copeland Capital Management specializes in Dividend Growth Investing. We offer Dividend Growth strategies across all capitalization ranges in traditional, tactical and alternative products. Copeland Capital Management is a 100% employee owned investment management firm headquartered in Conshohocken, PA. **Please contact Chuck Barrett, Director of Sales & Marketing for more information at (484) 351-3665 or [cbarrett@copelandcapital.com](mailto:cbarrett@copelandcapital.com).**

**Website: [www.copelandcapital.com](http://www.copelandcapital.com)**