



Summary of Material Changes

to

Part 2A of Form ADV: *Firm Brochure*

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This Firm Brochure (or "Brochure") provides information about the qualifications and business practices of Congress Asset Management Company, LLP. If you have any questions about the contents of this Brochure, or to receive a copy of this Brochure, please contact us at 617-737-1566 or info@congressasset.com or, by mail at the address listed above. The information in this Firm Brochure has not been approved or verified by the United States Securities and Exchange Commission ("SEC") or by any state securities authority.

Additional information about Congress Asset Management Company, LLP also is available on the SEC's website at www.adviserinfo.sec.gov. You can search this site by a unique identifying number, known as a CRD number. The Firm's CRD number is 105161.

Item 2 Summary of Material Changes

The following is a list of material changes made to this Form ADV, Part 2A ("Brochure") since Congress Asset Management Company, LLP's prior annual updating amendment to the Brochure, which was filed on March 24, 2024. In addition to the changes described below, this Brochure has been updated in other ways, such as providing clarification or additional information.

Item 14 Client Referrals and Other Compensation

In the section titled, "General", a description of the variable compensation that Congress Asset Management Company, LLP pays out of its own assets to an independent firm, Hantz Financial Services, Inc., for consulting services on marketing strategies for the Congress Large Cap Growth ETF and the Congress SMid Cap Growth ETF was added.