

# KC STARS|AREA-BASED MUTUAL FUND GROUPS

(ranked by assets under management)

2008 Rank	Name Address Internet Phone	Assets under management Number of investors	Fund types offered (partial)	Key shareholder services (partial)	Top local executive(s)
1.	<b>American Century Investments</b> 4500 Main St. Kansas City, MO 64111 816-531-5575 www.americancentury.com	\$101 billion 1,000,000+	fixed income, value equity, quantitative equity/asset allocation, U.S. growth equity, international equity	services for investment professionals, institutions, corporations and individual investors	Jonathan Thomas, president and CEO
2.	<b>Waddell &amp; Reed Financial Inc.</b> 6300 Lamar Ave. Overland Park, KS 66202 913-236-2000 www.waddell.com	\$59.4 billion 696,000	domestic and international equity and fixed income, specialty and asset allocation, money market	investment management, personal financial planning services, retirement plans, education funding, estate planning	Henry Herrmann, CEO Michael Avery, CIO Michael Strohm,
3.	<b>Security Global Investors</b> One Security Benefit Place Topeka, KS 66636 800-888-2461 www.securitybenefit.com	\$10.3 billion 150,000+	U.S. value equity, U.S. growth, global equity, fixed income, money markets, alternative investments	multiple classes of shares, rights of accumulation, letters of intent, retirement plans, telephone exchange privileges	Richard Goldman, president
4.	<b>UMB Scout Funds</b> 1010 Grand Blvd. Kansas City, MO 64106 800-862-6670 www.umbscoutfunds.com	\$5.8 billion 181,000	international, large cap, small cap, mid cap, U.S. Equity, fixed income	online and phone account access, call center, Web site	Clyde Wendel, president UMB Asset Management
5.	<b>Buffalo Funds</b> 5420 W. 61st Place Mission, KS 66205 800-492-8332 www.buffalofunds.com	\$3.4 billion 100,000+	domestic equity, balanced, high yield bond, international equity growth, China value equity	traditional, Roth and rollover IRAs, Coverdell Education Savings Accounts, SEP/SIMPLE IRAs	John Kornitzer, CEO Kent Gasaway, president
6.	<b>The Commerce Funds</b> 922 Walnut St., Suite 401 Kansas City, MO 64106 800-995-6365 www.commercefunds.com	\$1.52 billion 41,000+	domestic equity, balanced, tax-free bond, domestic taxable bond, short-term government, international equity	online account access, daily net asset value and distribution updates, dedicated call center	Larry Franklin, president

Information is compiled from questionnaires received from area mutual fund groups.