

FORM ADV

UNIFORM APPLICATION FOR INVESTMENT ADVISER REGISTRATION AND REPORT BY EXEMPT REPORTING ADVISERS

Primary Business Name: **VULCAN VALUE PARTNERS LLC**

CRD Number: **151190**

Other-Than-Annual Amendment - Item 1 Identifying Information

Rev. 10/2021

6/6/2025 5:28:24 PM

WARNING: Complete this form truthfully. False statements or omissions may result in denial of your application, revocation of your registration, or criminal prosecution. You must keep this form updated by filing periodic amendments. See Form ADV General Instruction 4.

Item 1 Identifying Information

Responses to this Item tell us who you are, where you are doing business, and how we can contact you. If you are filing an *umbrella registration*, the information in Item 1 should be provided for the *filing adviser* only. General Instruction 5 provides information to assist you with filing an *umbrella registration*.

A. Your full legal name (if you are a sole proprietor, your last, first, and middle names):

VULCAN VALUE PARTNERS LLC

B. (1) Name under which you primarily conduct your advisory business, if different from Item 1.A.

VULCAN VALUE PARTNERS LLC

List on Section 1.B. of Schedule D any additional names under which you conduct your advisory business.

(2) If you are using this Form ADV to register more than one investment adviser under an *umbrella registration*, check this box

☐

If you check this box, complete a Schedule R for each relying adviser.

C. If this filing is reporting a change in your legal name (Item 1.A.) or primary business name (Item 1.B.(1)), enter the new name and specify whether the name change is of

☐ your legal name or ☐ your primary business name:

D. (1) If you are registered with the SEC as an investment adviser, your SEC file number: **801-70739**

(2) If you report to the SEC as an *exempt reporting adviser*, your SEC file number:

(3) If you have one or more Central Index Key numbers assigned by the SEC ("CIK Numbers"), all of your CIK numbers:

CIK Number

1556785

E. (1) If you have a number ("CRD Number") assigned by the *FINRA's CRD* system or by the *IARD* system, your *CRD* number:

151190

If your firm does not have a CRD number, skip this Item 1.E. Do not provide the CRD number of one of your officers, employees, or affiliates.

(2) If you have additional *CRD* Numbers, your additional *CRD* numbers:

No Information Filed

F. *Principal Office and Place of Business*

(1) Address (do not use a P.O. Box):

Number and Street 1:

THREE PROTECTIVE CENTER

City:

BIRMINGHAM

State:

Alabama

Number and Street 2:

2801 HIGHWAY 280 SOUTH, STE 300

Country:

United States

ZIP+4/Postal Code:

35223

If this address is a private residence, check this box: ☐

List on Section 1.F. of Schedule D any office, other than your principal office and place of business, at which you conduct investment advisory business. If you are applying for registration, or are registered, with one or more state securities authorities, you must list all of your offices in the state or states to which you are applying for registration or with whom you are registered. If you are applying for SEC registration, if you are registered only with the SEC, or if you are reporting to the SEC as an exempt reporting adviser, list the largest twenty-five offices in terms of numbers of employees as of the end of your most recently completed fiscal year.

(2) Days of week that you normally conduct business at your principal office and place of business:

☒ Monday - Friday ☐ Other:

Normal business hours at this location:

8:00 A.M. - 5:00 P.M.

(3) Telephone number at this location:

205-803-1582

(4) Facsimile number at this location, if any:

205-721-9867

(5) What is the total number of offices, other than your principal office and place of business, at which you conduct investment advisory business as of the end of your most recently completed fiscal year?

0

G. Mailing address, if different from your principal office and place of business address:

Number and Street 1:

Number and Street 2:

City:

State:

Country:

ZIP+4/Postal Code:

If this address is a private residence, check this box: ☐

H. If you are a sole proprietor, state your full residence address, if different from your principal office and place of business address in Item 1.F.:

Number and Street 1:

Number and Street 2:

City:

State:

Country:

ZIP+4/Postal Code:

Yes No

I. Do you have one or more websites or accounts on publicly available social media platforms (including, but not limited to, Twitter, Facebook and LinkedIn)?

☒ ☐

If "yes," list all firm website addresses and the address for each of the firm's accounts on publicly available social media platforms on Section 1.I. of Schedule D. If a website address serves as a portal through which to access other information you have published on the web, you may list the portal without listing addresses for all of the other information. You may need to list more than one portal address. Do not provide the addresses of websites or accounts on publicly available social media platforms where you do not control the content. Do not provide the individual electronic mail (e-mail) addresses of employees or the addresses of employee accounts on publicly available social media platforms.

J. Chief Compliance Officer

(1) Provide the name and contact information of your Chief Compliance Officer. If you are an exempt reporting adviser, you must provide the contact information for your Chief Compliance Officer, if you have one. If not, you must complete Item 1.K. below.

Name:

ASHLEY MANN

Other titles, if any:

CHIEF COMPLIANCE OFFICER

Telephone number:

205-803-1582

Facsimile number, if any:

205-721-9867

Number and Street 1:

THREE PROTECTIVE CENTER

Number and Street 2:

2801 HIGHWAY 280 SOUTH, STE 300

City:

BIRMINGHAM

State:

Alabama

Country:

United States

ZIP+4/Postal Code:

35223

Electronic mail (e-mail) address, if Chief Compliance Officer has one:

AMANN@VULCANVALUEPARTNERS.COM

(2) If your Chief Compliance Officer is compensated or employed by any *person* other than you, a *related person* or an investment company registered under the Investment Company Act of 1940 that you advise for providing chief compliance officer services to you, provide the *person's* name and IRS Employer Identification Number (if any):

Name:

IRS Employer Identification Number:

- K. Additional Regulatory Contact Person: If a person other than the Chief Compliance Officer is authorized to receive information and respond to questions about this Form ADV, you may provide that information here.

Name:

ANNE JONES

Titles:

COO

Telephone number:

205-803-1582

Facsimile number, if any:

205-721-9867

Number and Street 1:

THREE PROTECTIVE CENTER

Number and Street 2:

2801 HIGHWAY 280 SOUTH, STE 300

City:

BIRMINGHAM

State:

Alabama

Country:

United States

ZIP+4/Postal Code:

35223

Electronic mail (e-mail) address, if contact person has one:

ANNE@VULCANVALUEPARTNERS.COM

- L. Do you maintain some or all of the books and records you are required to keep under Section 204 of the Advisers Act, or similar state law, somewhere other than your *principal office and place of business*? Yes No
- ☒ ☐

If "yes," complete Section 1.L. of Schedule D.

- M. Are you registered with a *foreign financial regulatory authority*? Yes No
- ☐ ☐

Answer "no" if you are not registered with a *foreign financial regulatory authority*, even if you have an affiliate that is registered with a *foreign financial regulatory authority*. If "yes," complete Section 1.M. of Schedule D.

- N. Are you a public reporting company under Sections 12 or 15(d) of the Securities Exchange Act of 1934? Yes No
- ☐ ☒

- O. Did you have \$1 billion or more in assets on the last day of your most recent fiscal year? Yes No
- ☐ ☒

If yes, what is the approximate amount of your assets:

- ☐ \$1 billion to less than \$10 billion
- ☐ \$10 billion to less than \$50 billion
- ☐ \$50 billion or more

For purposes of Item 1.O. only, "assets" refers to your total assets, rather than the assets you manage on behalf of clients. Determine your total assets using the total assets shown on the balance sheet for your most recent fiscal year end.

- P. Provide your *Legal Entity Identifier* if you have one:
- 549300MHYFHBK14BXI81

A *legal entity identifier* is a unique number that companies use to identify each other in the financial marketplace. You may not have a *legal entity identifier*.

SECTION 1.B. Other Business Names

No Information Filed

SECTION 1.F. Other Offices

No Information Filed

SECTION 1.I. Website Addresses

List your website addresses, including addresses for accounts on publicly available social media platforms where you control the content (including, but not limited to, Twitter, Facebook and/or LinkedIn). You must complete a separate Schedule D Section 1.I. for each website or account on a publicly available social media platform.

Address of Website/Account on Publicly Available Social Media Platform: <https://www.linkedin.com/company/vulcan-value-partners>

Address of Website/Account on Publicly Available Social Media Platform: [HTTP://WWW.VULCANVALUEPARTNERS.COM](http://www.vulcanvaluepartners.com)

SECTION 1.L. Location of Books and Records

Complete the following information for each location at which you keep your books and records, other than your *principal office and place of business*. You must complete a separate Schedule D, Section 1.L. for each location.

Name of entity where books and records are kept:
ARCHER

Number and Street 1:
801 CASSATT ROAD

City:
BERWYN

State:
Pennsylvania

Number and Street 2:
SUITE 212

Country:
United States

ZIP+4/Postal Code:
19312

If this address is a private residence, check this box: ☐

Telephone Number:
(484)615-6271

Facsimile number, if any:

This is (check one):

- ☐ one of your branch offices or affiliates.
☒ a third-party unaffiliated recordkeeper.
☐ other.

Briefly describe the books and records kept at this location.

ARCHER HOLDS THE ACCOUNT RECORDS FOR A WRAP PROGRAM THAT VULCAN SUBADVISES.

Name of entity where books and records are kept:
GLOBAL RELAY COMMUNICATIONS

Number and Street 1:

220 CAMBIE STREET

City:

VANCOUVER

State:

Number and Street 2:

2ND FLOOR

Country:

Canada

ZIP+4/Postal Code:

V6B2M9

If this address is a private residence, check this box: ☐

Telephone Number:

604-484-6630

Facsimile number, if any:

This is (check one):

- ☐ one of your branch offices or affiliates.
☒ a third-party unaffiliated recordkeeper.
☐ other.

Briefly describe the books and records kept at this location.

EMAIL ARCHIVING RECORDS

Name of entity where books and records are kept:

PROXY EDGE/ BROADRIDGE

Number and Street 1:

1981 MADISON AVENUE

City:

LAKE SUCCESS

State:

New York

Number and Street 2:

Country:

United States

ZIP+4/Postal Code:

11042

If this address is a private residence, check this box: ☐

Telephone Number:

800-353-0103

Facsimile number, if any:

This is (check one):

- ☐ one of your branch offices or affiliates.
☒ a third-party unaffiliated recordkeeper.
☐ other.

Briefly describe the books and records kept at this location.

PROXY VOTING RECORDS

Name of entity where books and records are kept:

SMARSH

Number and Street 1:

110 WILLIAM STREET SUITE 1804

City:

NEW YORK

State:

New York

Number and Street 2:

Country:

United States

ZIP+4/Postal Code:

10038

If this address is a private residence, check this box: ☐

Telephone Number:

503-946-5980

Facsimile number, if any:

This is (check one):

- ☐ one of your branch offices or affiliates.
☒ a third-party unaffiliated recordkeeper.
☐ other.

Briefly describe the books and records kept at this location.

WEBSITE ARCHIVING

Name of entity where books and records are kept:

THE NORTHERN TRUST COMPANY

Number and Street 1:

50 SOUTH LASALLE STREET

Number and Street 2:

City:

CHICAGO

State:

Illinois

Country:

United States

ZIP+4/Postal Code:

60603

If this address is a private residence, check this box: ☐

Telephone Number:

312-557-5161

Facsimile number, if any:

This is (check one):

- ☐ one of your branch offices or affiliates.
☒ a third-party unaffiliated recordkeeper.
☐ other.

Briefly describe the books and records kept at this location.

BOOKS AND RECORDS FOR PRIVATE FUND

Name of entity where books and records are kept:

IRON MOUNTAIN

Number and Street 1:

3100 1ST AVENUE SOUTH

Number and Street 2:

City:

BIRMINGHAM

State:

Alabama

Country:

United States

ZIP+4/Postal Code:

35233

If this address is a private residence, check this box: ☐

Telephone Number:

610-792-7122

Facsimile number, if any:

This is (check one):

- ☐ one of your branch offices or affiliates.

- ☐ a third-party unaffiliated recordkeeper.
- ☒ other.

Briefly describe the books and records kept at this location.
OFF SIGHT SECURE STORAGE FOR VARIOUS CORPORATE RECORDS.

Name of entity where books and records are kept:
ULTIMUS PRIVATE FUND SOLUTIONS

Number and Street 1:
4221 NORTH 203RD STREET

Number and Street 2:
SUITE 100

City:
ELKHORN

State:
Nebraska

Country:
United States

ZIP+4/Postal Code:
68022

If this address is a private residence, check this box: ☐

Telephone Number:
8886738964

Facsimile number, if any:

This is (check one):

- ☐ one of your branch offices or affiliates.
- ☒ a third-party unaffiliated recordkeeper.
- ☐ other.

Briefly describe the books and records kept at this location.
BOOKS AND RECORDS FOR VULCAN'S PRIVATE FUNDS

Name of entity where books and records are kept:
ADVISER COMPLIANCE ASSOCIATES, LLC

Number and Street 1:
909 ROSE AVENUE

Number and Street 2:
SUITE 950

City:
N. BETHESDA

State:
Maryland

Country:
United States

ZIP+4/Postal Code:
20852

If this address is a private residence, check this box: ☐

Telephone Number:
301-495-7850

Facsimile number, if any:

This is (check one):

- ☐ one of your branch offices or affiliates.
- ☒ a third-party unaffiliated recordkeeper.
- ☐ other.

Briefly describe the books and records kept at this location.
CLOUD-BASED STORAGE OF REGULATORY COMPLIANCE RECORDKEEPING.

Name of entity where books and records are kept:
AMAZON WEB SERVICES

Number and Street 1:
410 TERRY AVENUE

Number and Street 2:

City:
SEATTLE

State:
Washington

Country:
United States

ZIP+4/Postal Code:
98109

If this address is a private residence, check this box: ☐

Telephone Number:
833-662-9873

Facsimile number, if any:

This is (check one):

- ☐ one of your branch offices or affiliates.
☒ a third-party unaffiliated recordkeeper.
☐ other.

Briefly describe the books and records kept at this location.
CLOUD-BASED STORAGE OF ADVERTISING MATERIALS AND REVIEWS RECORDKEEPING.

Name of entity where books and records are kept:
STAR COMPLIANCE

Number and Street 1:
9200 CORPORATE BLVD

Number and Street 2:
SUITE 440

City:
ROCKVILLE

State:
Maryland

Country:
United States

ZIP+4/Postal Code:
20850

If this address is a private residence, check this box: ☐

Telephone Number:
301-340-3900

Facsimile number, if any:

This is (check one):

- ☐ one of your branch offices or affiliates.
☒ a third-party unaffiliated recordkeeper.
☐ other.

Briefly describe the books and records kept at this location.
CLOUD-BASED STORAGE OF EMPLOYEE COMPLIANCE RECORDKEEPING.

Name of entity where books and records are kept:
ACUITY KNOWLEDGE PARTNERS

Number and Street 1:
4TH FLOOR, MARTIN HOUSE

Number and Street 2:
5 MARTIN LANE

City:
LONDON

State:

Country:
United Kingdom

ZIP+4/Postal Code:
EC4R 0DP

If this address is a private residence, check this box: ☐

Telephone Number:
++440207550449

Facsimile number, if any:

This is (check one):

- ☐ one of your branch offices or affiliates.
☒ a third-party unaffiliated recordkeeper.
☐ other.

Briefly describe the books and records kept at this location.

CLOUD-BASED STORAGE OF REGULATORY COMPLIANCE RECORDKEEPING

Name of entity where books and records are kept:
OAKWORTH CAPITAL BANK

Number and Street 1:
850 SHADES CREEK PARKWAY

Number and Street 2:

City:
BIRMINGHAM

State:
Alabama

Country:
United States

ZIP+4/Postal Code:
35209

If this address is a private residence, check this box: ☐

Telephone Number:
205.263.4700

Facsimile number, if any:
205.263.4699

This is (check one):

- ☐ one of your branch offices or affiliates.
☒ a third-party unaffiliated recordkeeper.
☐ other.

Briefly describe the books and records kept at this location.

BOOKS AND RECORDS FOR PRIVATE FUND

Name of entity where books and records are kept:
MICROSOFT AZURE

Number and Street 1:
5150 RODGERS RD

Number and Street 2:

City:
SAN ANTONIO

State:
Texas

Country:
United States

ZIP+4/Postal Code:
78251

If this address is a private residence, check this box: ☐

Telephone Number:
18335381100

Facsimile number, if any:

This is (check one):

- ☐ one of your branch offices or affiliates.
- ☒ a third-party unaffiliated recordkeeper.
- ☐ other.

Briefly describe the books and records kept at this location.

CLOUD BASED STORAGE OF CORPORATE AND COMPLIANCE RECORDS.

Name of entity where books and records are kept:

STP INVESTMENT SERVICES

Number and Street 1:

44 W GAY STREET

Number and Street 2:

SUITE 300

City:

WEST CHESTER

State:

Pennsylvania

Country:

United States

ZIP+4/Postal Code:

19380

If this address is a private residence, check this box: ☐

Telephone Number:

610-363-5684

Facsimile number, if any:

This is (check one):

- ☐ one of your branch offices or affiliates.
- ☒ a third-party unaffiliated recordkeeper.
- ☐ other.

Briefly describe the books and records kept at this location.

CLOUD-BASED STORAGE OF BACK OFFICE RECORDKEEPING.

SECTION 1.M. Registration with Foreign Financial Regulatory Authorities

List the name and country, in English, of each *foreign financial regulatory authority* with which you are registered. You must complete a separate Schedule D Section 1.M. for each *foreign financial regulatory authority* with whom you are registered.

Name of Country/*Foreign Financial Regulatory Authority*:

Australia - Australian Securities and Investments Commission

Other:

Name of Country/*Foreign Financial Regulatory Authority*:

Canada - Alberta Securities Commission

Other:

Name of Country/*Foreign Financial Regulatory Authority*:

Canada - New Brunswick Securities Commission

Other:

Name of Country/*Foreign Financial Regulatory Authority*:

Canada - Ontario Securities Commission

Other:

Name of Country/*Foreign Financial Regulatory Authority*:

Canada - Quebec, Financial Markets Authority

Other:

Name of Country/*Foreign Financial Regulatory Authority*:

Ireland - Central Bank of Ireland

Other:

Name of Country/*Foreign Financial Regulatory Authority*:

Luxembourg, Grand Duchy of - Commission to Surveillance of the Finance Sector

Other: