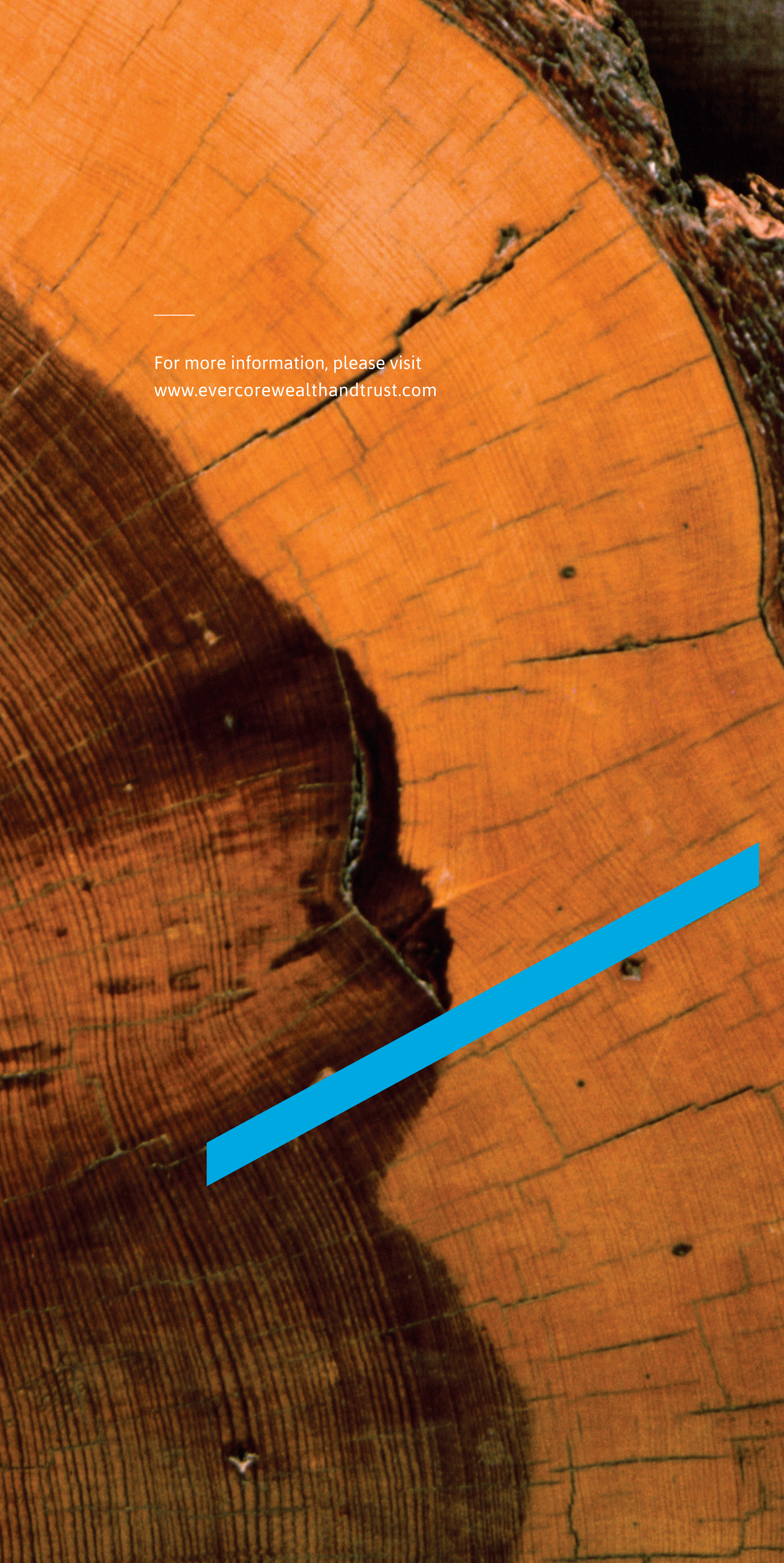
EVERCORE

evercorewealthandtrust.com

The New Standard In Wealth Management

NEW YORK | MINNEAPOLIS | PALM BEACH | SAN FRANCISCO | TAMPA | WILMINGTON



For more information, please visit
www.evercorewealthandtrust.com

Committed to meeting our clients' financial goals, and to earning and sustaining their trust

Welcome to Our Firm

We are an experienced team of independent thinkers, managing complex wealth in a culture of integrity – and focused on delivering real results. Many of us have worked together for years, and all of us share the Evercore values, always acting in our clients' best interests.

About Us

Evercore Wealth Management and Evercore Trust Company, N.A. are part of Evercore, the global independent investment banking advisory firm (NYSE: EVR).

Evercore Wealth Management is one of the leading Registered Investment Advisors in the United States (*Barron's, Financial Advisor*[1]), and Evercore Trust Company, N.A. provides clients with a modern, more personal alternative to the traditional trust companies.

Together, we serve families, endowments and foundations across the United States.

Are we right for you?

Our clients and professionals come from all walks of life, but we share important values.

Integrity:
We built – and run – our business so we can always act in our clients' best interests.

Enduring relationships:
We know that clients benefit from direct and lasting relationships with their wealth managers and trust professionals.

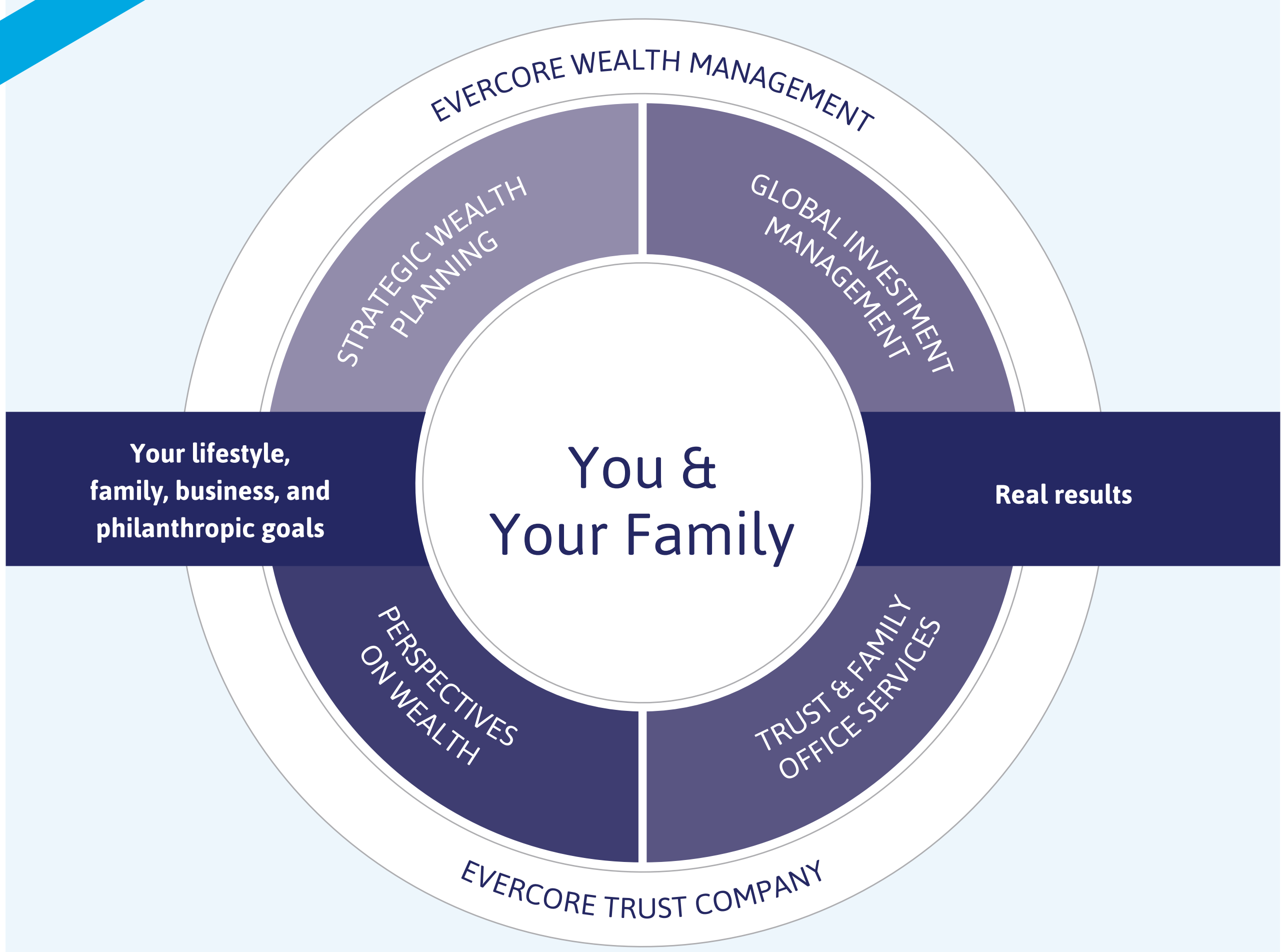
An open mind:
We are independent thinkers with an entrepreneurial spirit.

Real results:
We never lose sight of our clients' goals.

[1] We were named among the Top 100 Independent U.S. Registered Investment Advisors by *Barron's* for 2023 (09/15/23). We were named a leading registered investment advisor for 2023 by Financial Advisor (07/14/23).

Our Approach: Independent Thinking and Integrated Delivery

Our distinctive approach integrates planning, investing, and trust and family office services.



Strategic Wealth Planning

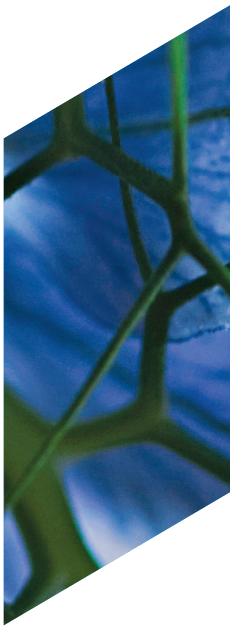
Dedicated teams work closely with you and your other advisors to establish and meet your goals – for yourself and your family, for your business, and for the people, causes and institutions that are important to you.

We help clients navigate the financial challenges and opportunities across life's transitions – marriage, educating and supporting children, living alone after death or divorce, building, selling or transferring a business, and retirement – and in creating a thoughtful, lasting legacy.

Global Investment Management

We know that it's what you keep – after taxes and inflation – that matters. That's why we measure our performance by our success in meeting your specific goals, as well as against established investment benchmarks. Our customized portfolios accommodate concentrated stock holdings, specific impact investing considerations and illiquid assets.

Our experienced portfolio managers combine our core investment capabilities with those of carefully selected international and alternative asset managers, as we strive to deliver the best possible risk-adjusted returns, net of tax, inflation and fees, to meet your goals.



Trust and Family Office Services

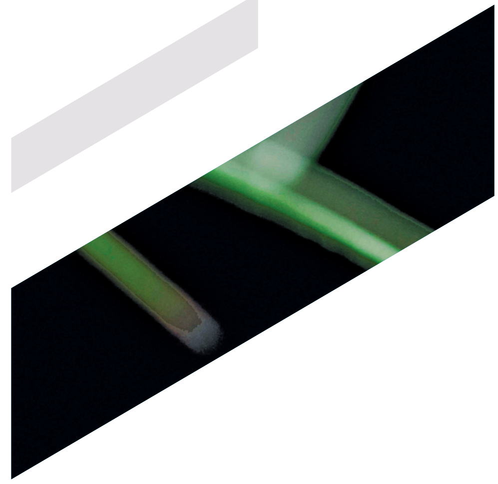
There is no bureaucratic runaround at Evercore – and no 1-800 numbers. We offer clients a modern, efficient alternative to traditional trust companies and family offices, providing integrated solutions and truly personal service.

We establish and administer a wide range of trusts, manage liquidity events and unique assets, and help navigate sensitive situations. As families grow, we are able to address the wealth management needs of each generation, serving as the central point of contact and working closely with the family's other advisors.

At Evercore, we strive to make the complex simple – and to engage, educate and serve the whole family.

Private Wealth Education

Everyone has something to learn. Our educational programs include one-on-one tutorials, small seminars and larger gatherings, covering topics ranging from basic financial literacy to in-depth seminars on thoughtful giving to children and philanthropy.



Perspectives on Wealth

Our firm's best thinking can help inform your decisions.

Independent Thinking®, our quarterly journal, and our *Independent Thinking*® series of speaker events represent our views, those of our Evercore colleagues and our carefully selected external speakers. Topics range from timely updates on planning and investing in changing tax and market environments to in-depth features on the outlook for the economy, impact investing, transaction planning and navigating life's transitions.

We continuously invest in technology and provide comprehensive online reporting through our interactive client site. We additionally provide quarterly investment outlooks, market updates, white papers and other materials.

Communications are on your terms, and we welcome your engagement.

Please visit www.evercorewealthandtrust.com to view our latest issue of *Independent Thinking*® and to learn more about our firm.

We look forward to meeting you.

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Disclosures

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Any references made to awards or rankings are not an endorsement by any third party to invest with Evercore Wealth Management and are not indicative of future performance. Current or prospective clients should not rely on awards or rankings for any purpose and should conduct their own review prior to investing.

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