EVERCORE

evercorewealthandtrust.com

Personal Trust and Fiduciary Services at Evercore

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

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evercorewealthandtrust.com

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

Setting a New Standard

Evercore offers a modern alternative to traditional trust companies — one that is flexible, tax-efficient and sensitive to the changing needs of complex families. Our experienced professionals work closely with our clients and their other trusted advisors to realize the goals of grantors and maintain the well-being of beneficiaries.

- Strategic Wealth Planning
- Global Investment Management
- Trust and Family Office Services
- Perspectives on Wealth

About Us

Evercore Trust Company, N.A. and Evercore Wealth Management, LLC are backed by Evercore (NYSE: EVR), a leading global independent investment banking advisory firm. We have the experience, the flexibility, and the resolve to set a new standard in trust and fiduciary services, reflective of the Evercore culture of integrity.

Evercore serves families as well as institutions:

National Trust Bank & Delaware Trust Services

Evercore Trust Company is a national trust bank with the authority to serve as a corporate trustee and executor throughout the United States. Evercore also offers clients access to the tax and regulatory advantages associated with Delaware trusts.

National Wealth Management Firm

Evercore Wealth Management ranks among the leading U.S. registered investment advisors (*Barron's, Financial Advisor*[1]).

[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 professionals are among the most experienced in this business, who value direct and lasting relationships with our clients, their families and their other trusted advisors. We serve as executor, personal representative, sole trustee, co-trustee, directed trustee, successor trustee and agent for trustee. We are team players.

A Culture of Integrity

ALWAYS	NEVER
Flexible and responsive	Big bank bureaucracy
Lasting relationships; the family's "first call"	A transactional approach
Customized trust solutions	One-size-fits-all products
Transparency in all our dealings	Hidden fees

We have a simple fee structure and, in contrast to many large corporate trustees, we do not charge an additional fee for working with individual co-trustees or co-executors. We do not charge a premium to serve as trustee.

Working with Evercore

We work with clients' attorneys and other trusted advisors to establish customized trusts:

- Charitable Trusts
- Delaware Asset Protection Trusts
- Delaware Directed Trusts
- Delaware Dynasty Trusts
- Generation-Skipping Trusts
- Private Foundations
- Revocable and Irrevocable Trusts
- Life Insurance Trusts
- Special Needs Trusts
- Special Purpose Trusts
- Testamentary Trusts

We provide comprehensive global investment management and trust and family office services:

Global Investment Management

- Asset Allocation
- Efficient Architecture® Investing
- Customized Portfolio Management
- Concentrated Stock Management
- Illiquid and Alternative Asset Management

Trust and Family Office Services

- Strategic Wealth Planning
- Philanthropic Management
- Trust Administration and Tax Reporting
- Custody and Safekeeping of Assets
- Trust and Estate Settlement Services (separate rates apply)
- Guardianship Administrations
- Family Governance
- Private Wealth Education

Direct Relationships with Experienced Professionals

We serve families across the United States and international families with U.S. interests, helping to establish customized trusts, managing investment portfolios to meet trust goals, and delivering comprehensive trust and family office services.

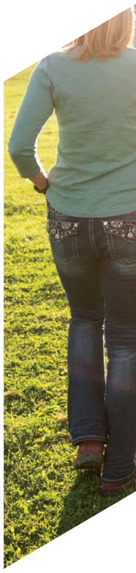
We are able to administer complex trusts and navigate sensitive family situations. We manage unique assets including real estate, limited liability companies, alternative assets, closely held businesses and life insurance.

We believe that everyone has something to learn. Our professionals can engage and educate individuals and families, on topics ranging from planning and investing fundamentals to sophisticated strategies, as well as on the emotional aspects of wealth.

Serving business owners and executives and their families at a critical time

Pre- and post-transaction planning

Evercore Trust Company and Evercore Wealth Management provide strategic wealth and trust planning and investment advice to individuals and families considering a liquidity event or other significant transaction.



Global Investment Management

Clients of Evercore Trust Company and Evercore Wealth Management are served by a dedicated team that includes experienced Portfolio Managers and a Wealth & Fiduciary Advisor.

We invest across a range of assets defined by their risk and liquidity characteristics, including stocks and bonds, private real estate, private equity and other alternative assets designed for long-term growth. Through a process we call Efficient Architecture®, we combine our proprietary expertise and carefully selected external investments to strive to generate strong after-fee, after-tax, risk-adjusted returns across a range of asset classes.

We can accommodate concentrated holdings, private businesses, and real estate, and we can invest to meet specific goals.

Our process, relationships, and fees are entirely transparent. We are proud of our performance and our success in meeting our clients' goals.

Investing to meet the goals of grantors and the needs of beneficiaries

- Active portfolio managers, able to evaluate and monitor external managers
- Proprietary management of core capabilities, resulting in potentially significant savings for investors
- Carefully selected external managers across asset classes, including real estate and private equity
- Active rebalancing to raise returns and minimize portfolio volatility
- Management of legacy holdings, minimizing associated tax consequences
- Agnostic investment choices; no additional fees on proprietary strategies
- Blended active and passive strategies in transparent, tax-efficient effective portfolios

Considering a Corporate Trustee?

We know why families often hesitate to appoint a corporate trustee. That's why we are striving to set a new standard in trust and fiduciary services, free of big bank bureaucracy and impersonal service. Our constructive, flexible approach enables us to deliver customized and tax-efficient solutions for families, now, and as circumstances and goals evolve.

Evercore Trust Company can serve as co-trustee or agent for trustee for individuals who have been nominated for the important role of trustee or co-trustee. Individual trustees can rely on our fiduciary experience and resources while benefiting from our investment management, custodial, recordkeeping, and beneficiary reporting capabilities.

- As an experienced and open-minded corporate trustee, we can balance the goals of the grantors and current and future beneficiaries.
- We are responsible for the management of the assets in the trust, distributions, and the preparation of tax returns and any other necessary filings.
- We support and educate individual trustees, beneficiaries and, if appropriate, family members.
- We work in accordance with the terms and purpose of the trust, and in the interests of the beneficiaries.
- As a corporate trustee, we can be removed or replaced.
- We are held to a higher fiduciary standard than individuals in discharging trust responsibilities.
- Our professionals are able to work with complex families, managing sensitive dynamics while never losing sight of prudent investment oversight.
- We help grantors manage the financial issues associated with cognitive decline and special needs.

Delaware Trust Advantages

Evercore provides qualified clients with access to the benefits of Delaware trusts:

- Bifurcation of trustee responsibilities with Delaware Directed Trusts to enhance the administration of multigenerational trusts
- Modifications of irrevocable trusts available under Delaware law, including decantings, mergers, nonjudicial settlement agreements and consent modifications by living settlors
- No state income tax imposed at the trust level or for distributions to nonresident beneficiaries
- Potential income tax savings for nonresidents with Delaware Incomplete Non-Grantor Trusts
- Perpetual planning with Delaware Dynasty Trusts
- Asset protection from creditors of solvent trustors with Delaware Asset Protection Trusts
- Confidentiality and privacy using Delaware silent trust statute
- Expanded investment opportunities for trust assets with the Delaware Prudent Investor Statute

Ready to learn more? We look forward to meeting with you.

Please contact **Chris Zander**, President & CEO of Evercore Trust Company and Evercore Wealth Management, at **zander@evercore.com** or **212.822.7622** for further information on trust and fiduciary services at our firm. Alternatively, contact our office nearest you.

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