1919 INVESTMENT COUNSEL
Complexity to Clarity

Women & Wealth

1919 Investment Counsel was founded on the belief that no two clients are alike. For over a century, we have been delivering services and tailored solutions that preserve, build, and manage wealth. We are committed to helping our clients achieve their financial goals with thoughtful advice.

1919 Women & Wealth Platform Services

With our deep financial planning approach and customized portfolio management, we are positioned to deliver exceptional value to female clients who face a multitude of distinct circumstances.

Our Solutions and Strengths for a broad range of client needs

*Includes Inclusive Investing Strategy.

The Opportunity to Help Women

Women entrepreneurs add over $5 trillion to the global wealth pool every year

Women currently control 32% of all global wealth

72% of women are concerned about financial security for their future

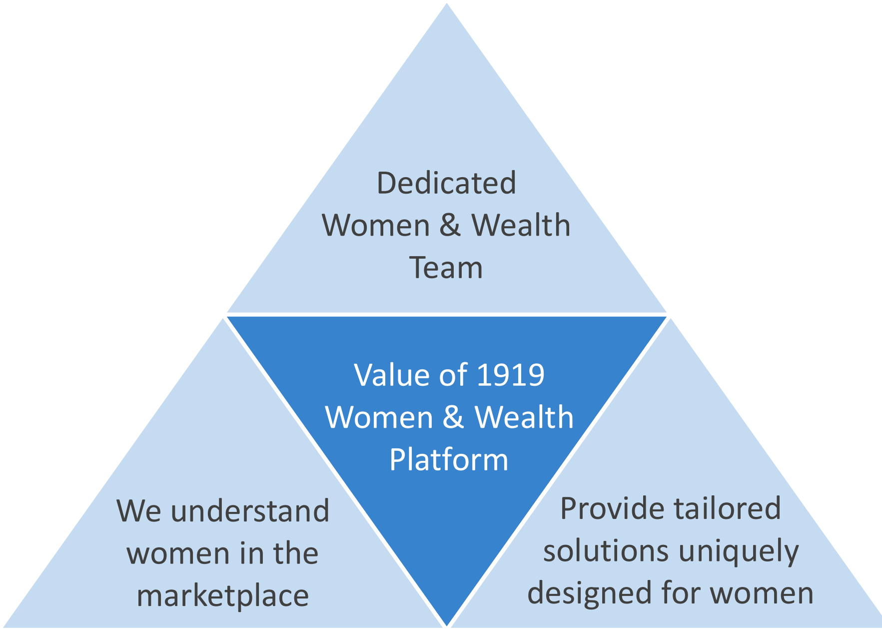
1919 for Women

In each interaction with our clients, we are guided by this first-order principle, "To listen and understand before advising." This is the foundation of what we do. We know that no two clients are the same and that every woman has her own financial goals and unique challenges. Longer life expectancies, higher likelihood of solo living, and a history of under service by financial institutions are a few of the many reasons 1919 focuses on women's wealth management needs. We consider the factors that may impact your future plans and offer solutions that we can help implement today.

Tailoring Wealth Strategies to You

We are committed to engaging and supporting women as they create and manage wealth. We provide investment and planning resources derived from decades of experience. A dedicated team partners with you to identify your values, priorities, and short- and long-term objectives. Our ultimate goal is to help connect your wealth plans to your goals and your goals to your values. We work collaboratively with you to create a tailored plan to meet your objectives now and tomorrow.

Women & Wealth At 1919



Why 1919?

- We listen, we ask questions, and we develop a plan-based approach to serve the nuanced needs of women investors.
- 1919 W&W helps bring our existing services into an all-encompassing platform to deliver impactful solutions to women clients – education, investment solutions, etc.
- We deliver the best possible results and solutions to our clients. The cornerstones of our firm's foundation are independent investment research, fully customized portfolios, financial planning depth, and responsible investing.
- We provide a best-in-class Responsible Investing approach, which includes our Inclusive Investing Strategy that focuses on companies positively impacting diversity and inclusion.
- We continuously evaluate our thinking and tools to ensure their relevance to our client's concerns and the evolving state of the world, from the global economy to the personal impact of tax law changes.
- 1919 seeks ongoing improvement, extending to our own culture; as we continue to learn and grow, the W&W team actively contributes to 1919's inclusive and respectful culture.
- We practice what we preach. We create a supportive community for women in the financial services industry to help them grow as advisors and professionals and to assist clients in achieving their wealth goals.

Women & Wealth provides and leverages **materials** and **tools** with immediate value-add, accessible to anyone on our website:

- Women & Wealth at 1919—FWA Alliance Talks Interview
- 1919: Partnerships that Endure
- Women & Wealth: Expected the Unexpected
- Women & Wealth: Planning Challenges and Opportunities
- Women & Wealth: 51% Not a Niche Market
- Financial Planning Checklist for Transitions
- Budget worksheet
- Financial Planning questionnaire

About 1919 Investment Counsel

1919 Investment Counsel, LLC is a registered investment advisor. Its mission for more than 100 years has been to provide counsel and insight that help families, individuals, and institutions achieve their financial goals. The firm has offices across the country in Baltimore, Birmingham, Cincinnati, New York, Philadelphia, San Francisco and Vero Beach. The firm has approximately $19.3 billion in client assets under management (as of June 30, 2021), of which approximately $2.3 billion are in Responsible Investments. 1919 Investment Counsel seeks to consistently deliver an extraordinary client experience through its independent thinking, expertise and personalized service. To learn more, please visit our website at **www.1919ic.com**.

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