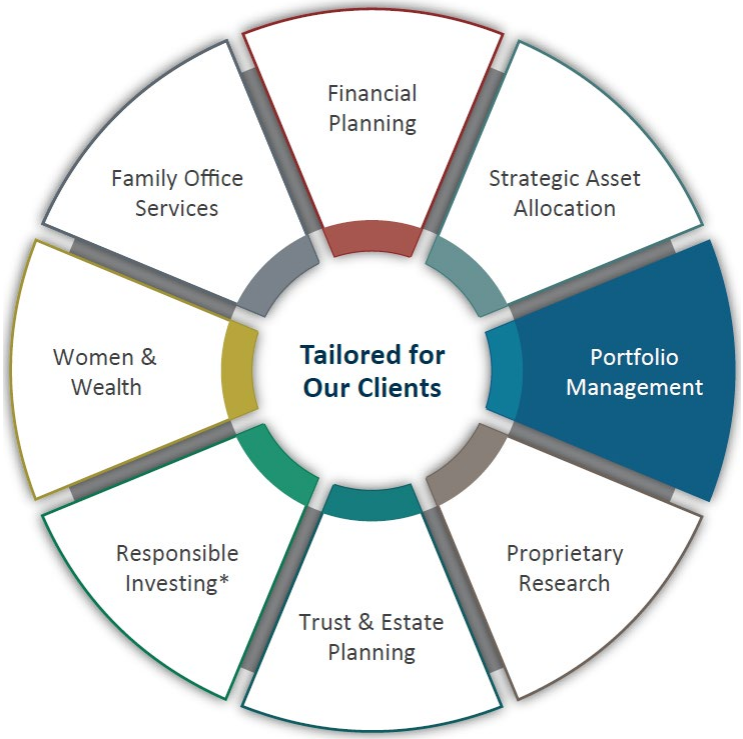
1919 INVESTMENT COUNSEL
Complexity to Clarity

1919 Investment Counsel, LLC ("1919") 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 Portfolio Management

Our ***1919 Portfolio Management*** teams ensure that your portfolio reflects your uniqueness, and is aligned with your broader aspirations and financial goals. Our approach and investment philosophy is that active management benefits our clients in the long run, especially in the development of an asset allocation that is responsive to changing client needs and our macro and global economic views. In portfolio construction, we may incorporate both active and passive investment vehicles to execute a customized solution.

Our Solutions and Strengths for a broad range of client needs



*Includes Inclusive Investing Strategy

1919 Portfolio Management Approach

We believe our investment approach and individual security selections deliver comprehensive portfolio solutions with a number of unique benefits:

- Tailored solutions that incorporate thoughtful insight, investment quality, tax efficiency and appropriate vehicles that match our client's specific values and goals.
- A focus on high quality investments facilitates longer-term preservation of capital and helps to avoid the permanent impairment of capital.
- Use of individual securities, institutional share class mutual funds and/or extremely low-cost index funds allows more transparency, risk control and adherence to investment policy guidelines.
- Active management and opportunistic diversification across asset classes, sectors and styles with low correlations offers the potential to optimize returns while minimizing risk.
- Proprietary fundamental research and independent thinking help to avoid the pitfalls of crowd psychology and the conflicts of interest that plague the investment industry.
- Applying investment disciplines across all investment styles brings consistency and control to the investment process and is an integral aspect of risk management.

Equities

Through our customized equity strategies, we take a long-term view and invest as business owners, not as short-term traders. We seek to minimize large losses, maximize performance and construct portfolios tailored to your goals and circumstances. These equity strategies consider both domestic and global opportunities:

Quality Growth
Global Growth
Disruptive Innovation
Dividend Growth
Dividend Income

Fixed Income

Within the context of your objectives, we seek to maximize total return and minimize risk through:

- A strategy customized to your goals, needs and risk preferences
- An actively managed, relative-value approach
- A disciplined buy and sell strategy
- A conservatively managed risk profile
- Tax-sensitive management when appropriate

We offer investment opportunities within the following Strategies:

Tax-Exempt Fixed Income
Full Range Duration Fixed Income
Intermediate Duration Fixed Income
Taxable Fixed Income
SRI//ESG Fixed Income

Responsible Investing

To ensure your investments are aligned with your values, we offer a proprietary, multi-dimensional socially responsive solution that integrates environmental, social, and corporate governance (ESG) factors; applies client values-based guidelines; and incorporates positive impact solutions in portfolios.

Additional Asset Classes

To complement 1919's core strategies, we engage third party investment managers for further diversification, and when appropriate given your objectives and risk tolerance, we may invest in strategies which may include:

- Small Cap Equities
- Developed Foreign and Emerging Markets Equities
- Convertible Bond and Market-Neutral Strategies
- Currency or Commodities Exposure
- Inflation-Protected Strategies
- High Yield Fixed Income
- Real Assets
- Private Equity
- Alternative Investments

About 1919 Investment Counsel, LLC
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, Houston, New York, Philadelphia, San Francisco and Vero Beach. The firm has approximately $17.3 billion in client assets under management (as of June 30, 2022), of which approximately $2.2 billion are in Responsible Investments. 1919 Investment Counsel, LLC 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.