NewEdge WEALTH

Do You Have the Edge?

MAKE THE MOST OF YOUR WEALTH WITH NEWEDGE WEALTH

WWW.NEWEDGEWEALTH.COM

MAKING THE MOST OF YOUR WEALTH IN TODAY'S WORLD REQUIRES WORKING WITH A FIRM WITH ACCESS TO A WEALTH OF RESOURCES

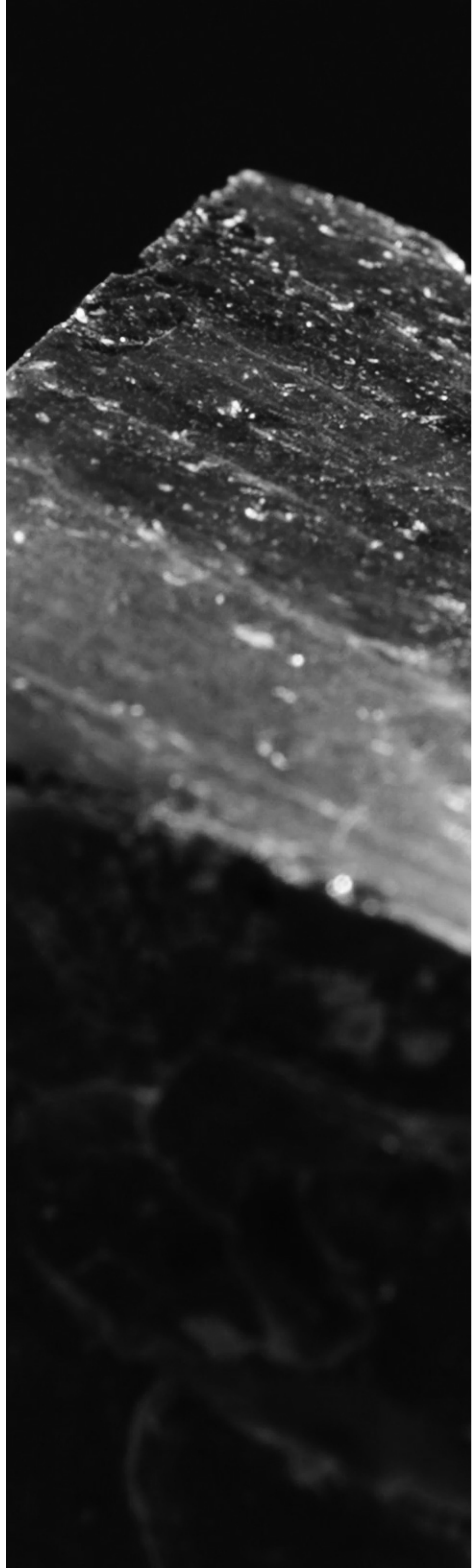
NewEdge Wealth is a firm where institutional caliber wealth management meets boutique-style service and support. It's a firm created by a team of industry-recognized leaders, purpose-built to meet the exceptional needs and demands of today's ultra-high-net-worth client through ideas, resources, and technology.

Our strategy is based on two principles. First, we are relentlessly focused on becoming better stewards of your wealth, rooted in the fundamentals of this business — Planning, Process, and Service. Second, we are never content with business as usual — we continually strive to take the dated tools of wealth management and hone them to a much sharper edge.

Our goal is to help you simplify, organize and manage the complex demands your wealth places on your life today, while also delivering a customized wealth strategy to help achieve the legacy you desire for tomorrow and beyond.

It's not just about doing more with your money. It's also about doing more with your time.

- **Ultra & High-Net-Worth Individuals**
- **Multi-Generational Families**
- **Entrepreneurs**
- **Family Offices**
- **Private Equity Professionals**



WHY YOU NEED A FIRM LIKE NEWEDGE WEALTH

The wealth management industry has reached an inflection point. We believe the large Wall Street firms can no longer keep pace with the changing needs and demands of clients — especially ultra high net worth clients. With thousands of advisors covering a wide range of clients, the large firms must cater to clients' needs across all asset levels, not the unique challenges and requirements of ultra-high-net-worth clients and family offices. That's where we come in.

The Genesis of NewEdge Wealth

NewEdge Wealth did not come together overnight. After exploring many different ways to structure the business, NewEdge Wealth created a model that marries the benefits and safety that clients have come to expect.

Flexibility and access are of the utmost importance — access to the kinds of products, investments and technology needed to support the wealth strategies of today's world and the flexibility to update those solutions over time.

That's why NewEdge Wealth's founding advisors partnered with EdgeCo Holdings, a leading provider of best-in-class, technology-enabled solutions for financial services firms and their clients. As of December 31, 2024, EdgeCo and its nearly 900+ employees service approximately $650 billion in assets under trading, custody, and technology, support over 425,000 retirement plans through custody, services and technology (approximately 60% of the plans in the United States), and work with more than 15,000 financial advisors and 500 financial institutions.

EdgeCo HOLDINGS

Retirement Services

AMERICAN TCS

Offers retirement plan recordkeeping, administration and trust & custody services both on a fully integrated bundled basis, as well as on an a-la-carte basis.

Wealth Management

NewEdge CAPITAL GROUP

Serves best-in-class wealth advisors under a common brand in the ultra-high-net-worth space and supports independent advisors operating under their own brand.

THE "EDGE" OF NEWEDGE WEALTH

NewEdge Wealth is grounded upon the belief that wealth management firms must evolve if they want to help ultra high net worth, family office and institutional clients navigate the complexities of their wealth.

NewEdge Wealth is different for two reasons. First, we provide access to insightful research, advice and technology that we have curated exclusively for ultra-high-net-worth, family office and institutional clients. Second, we focus on developing wealth strategies that are more customizable than what is available in yesterday's market. It's an approach designed around the nuances of your life and to anticipate your needs ahead of time. When combined, these objectives create a wealth management solution that can simplify your life today while working towards establishing your legacy.

Intellectual Capital

NO ORGANIZATION HAS A MONOPOLY ON GREAT IDEAS

Within every Wall Street firm, certain parts of the organization shine above others. For example, some are known for macro insights, others specialize in fixed income, while others are known for their coverage of emerging markets. At NewEdge Wealth, we select from the most elite to guide the strategy to help you achieve your goals. As a client of 'the street,' our firm has assembled best-of-breed research from large Wall Street firms and banks and cutting-edge research firms such as Fundstrat, Atrato Advisors, Empirical Research, and others.

Our "open-architecture" approach also applies to our intellectual capital, which is why we created an Investment Advisory Board comprised of world-renowned investors and strategists like Lee Cooperman and Tom Lee. These professionals complement our internal expertise and insights when it comes to assessing the broad investment landscape and thinking about "what's next."

Our approach is designed around the nuances of your life and tries to anticipate your needs ahead of time.

Access

EXCLUSIVE ACCESS TO THE INVESTMENT PRODUCTS YOU DEMAND

Our open-architecture platform not only provides access to the traditional asset managers, but also to many of the more tactical and emerging investment managers — sometimes on an exclusive basis. And because NewEdge Wealth is a customer of Wall Street, not a Wall Street firm focused on its proprietary products, we act on your behalf to carefully curate access to the best solutions available to us.

Service

PROVIDING A SELECT GROUP OF CLIENTS WITH THE BEST POSSIBLE SERVICE AND SUPPORT

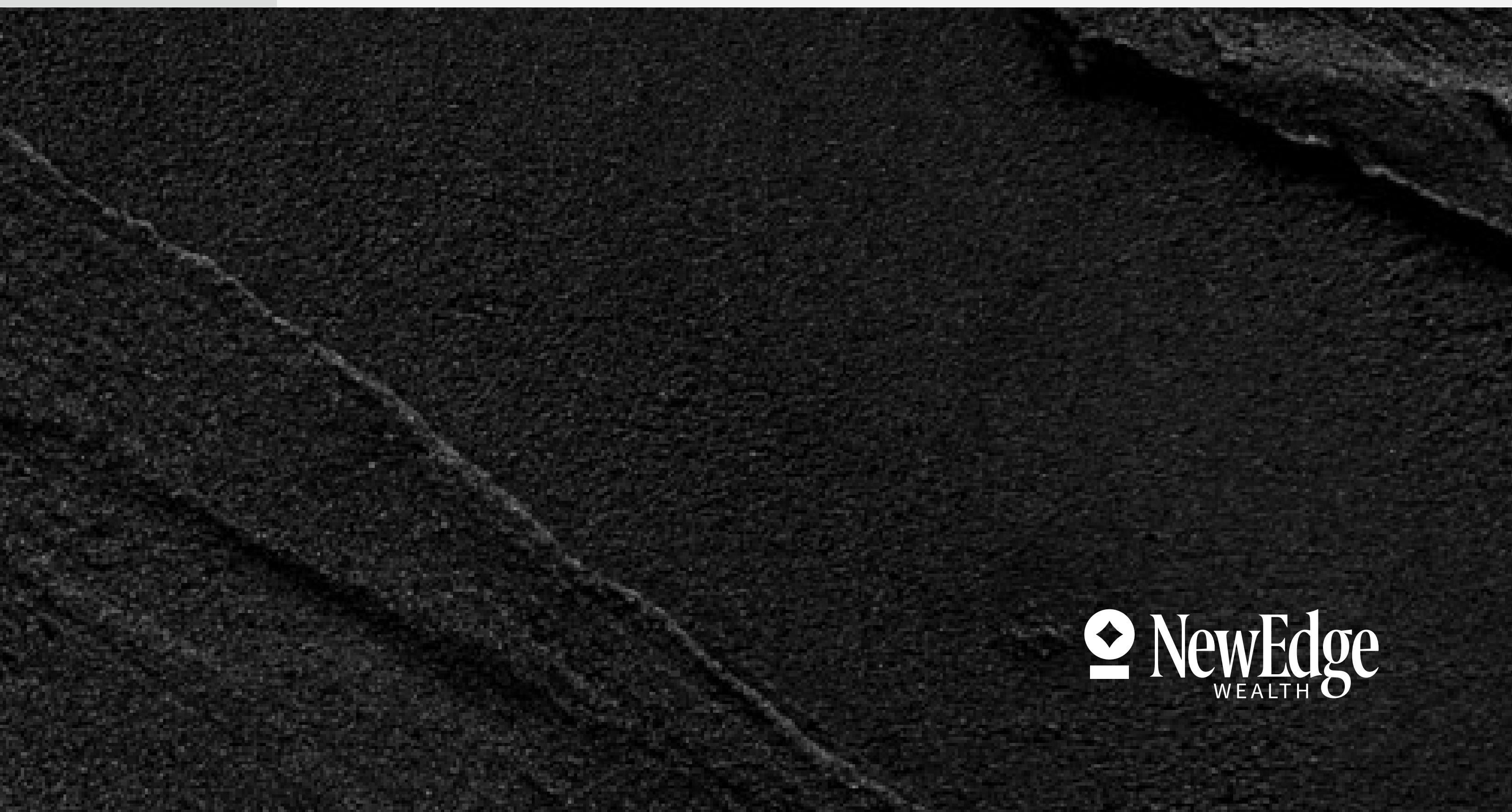
We believe every client deserves a custom service team with experts relevant to their needs. Because we work with a select group of clients, our investment team can genuinely partner with you to provide a differentiated level of attention. Of course, at the start of every relationship, more contact/communication is always required. But at NewEdge, the focus doesn't stop there. There will be many key moments, milestones and transitions in your life that will require the same level of engagement or more. That is why we keep our client list exclusive so that we can be available to you when you need us.

We believe every client deserves a custom service team with experts relevant to their needs.

Technology

TECHNOLOGY BUILT AROUND ENHANCING PERSONAL ADVICE AND SERVICE, NOT REPLACING IT

The NewEdge platform includes technology solutions from 30 different best-in-class vendors, allowing us to better serve you through comprehensive asset tracking and performance measurement tools. The platform consists of a complete view of your assets managed by NewEdge Wealth, as well as those assets held at more than 1,500 other financial institutions. A more complete picture means we can work with you to help make better, more informed decisions.



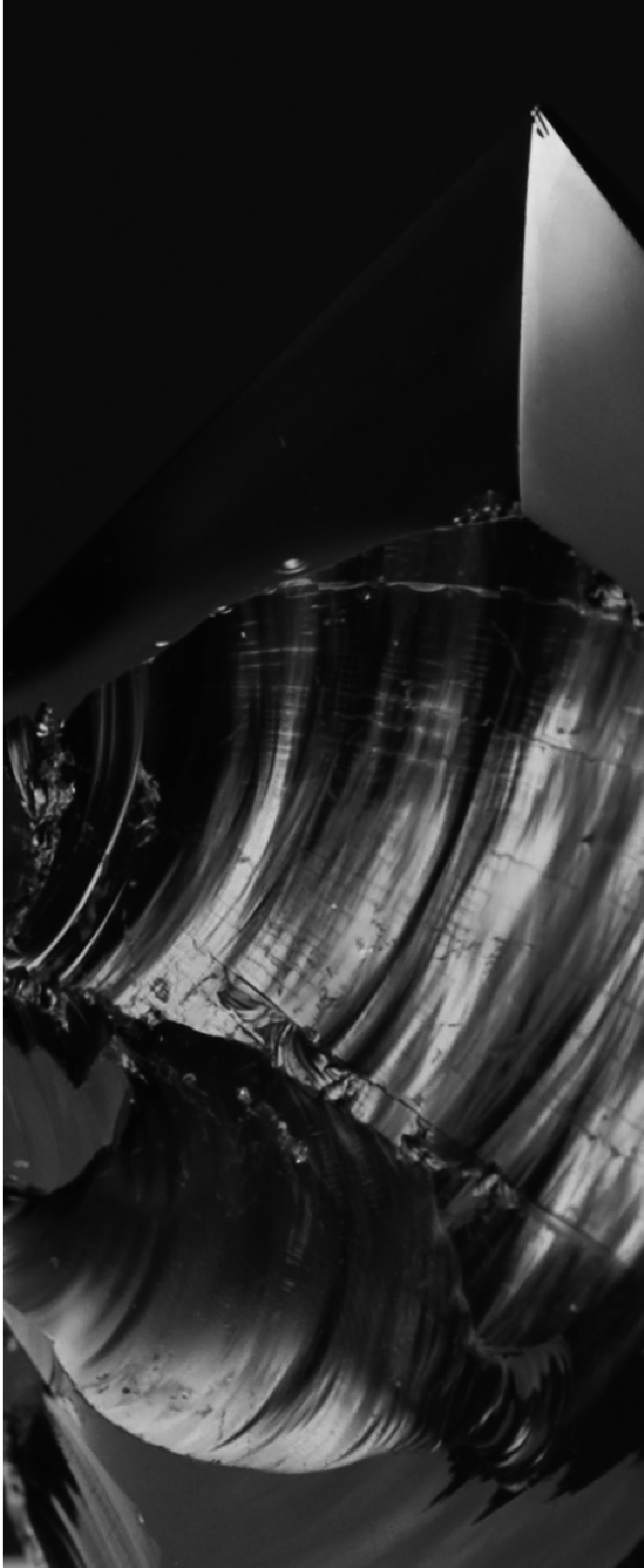
SIMPLIFY TODAY, WHILE ACHIEVING FOR TOMORROW & BEYOND

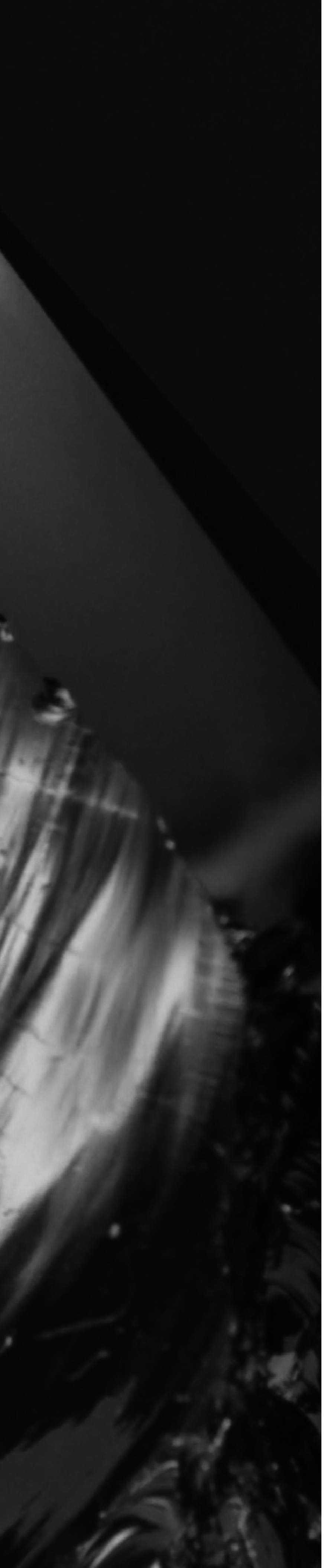
Because we work with a select number of clients, we can develop a personal relationship with you. We will gain a deep understanding of not just your financial situation but also your values, your relationships and your life goals. As we come to understand the nuances of your life, we can construct a wealth strategy that is designed just for you.

Your wealth strategy will be organized around three key dimensions:

- **Today** – What lifestyle expenses do you need to support today?
- **Tomorrow** – What are you striving towards for the next phase of your life?
- **Beyond** – What legacy do you want your life's work to leave behind?

Your wealth strategy isn't based on a "set it and forget it" approach. Instead, we monitor and recalibrate the strategy — measuring how your portfolio stands against those three key dimensions and adjusting accordingly. Then, should circumstances change or as opportunities arise, we will work through those situations with you, measuring both the opportunity and risk and determining a thoughtful solution.





Tax & Estate Planning

- Coordination with Attorney's and CPA's
- Estate Plan Review
- Life Insurance Review, Analysis & Comparison
- Tax Planning Strategies
- Titling of Asset Review
- Tax-Deferral & Reduction Strategies
- Charitable Gifting & Timing Analysis
- Tax-Loss Harvesting
- Tax Conscious Investment Decisions
- Tax Reporting & Documentation Coordination
- Family Meeting Facilitation
- Estate Disposition & Coordination

Planning & Forecasting

- Balance Sheet Reporting
- Net Worth Forecasting
- Financial Planning Scenario Testing
- Retirement Plan Analysis
- College Savings Planning

Cash Management

- Cash Flow Modeling
- ACH Origination, Transfer
- Complimentary Wire Transfers
- Remote Mobile Deposits
- Multi-Currency Access

Private Business Management

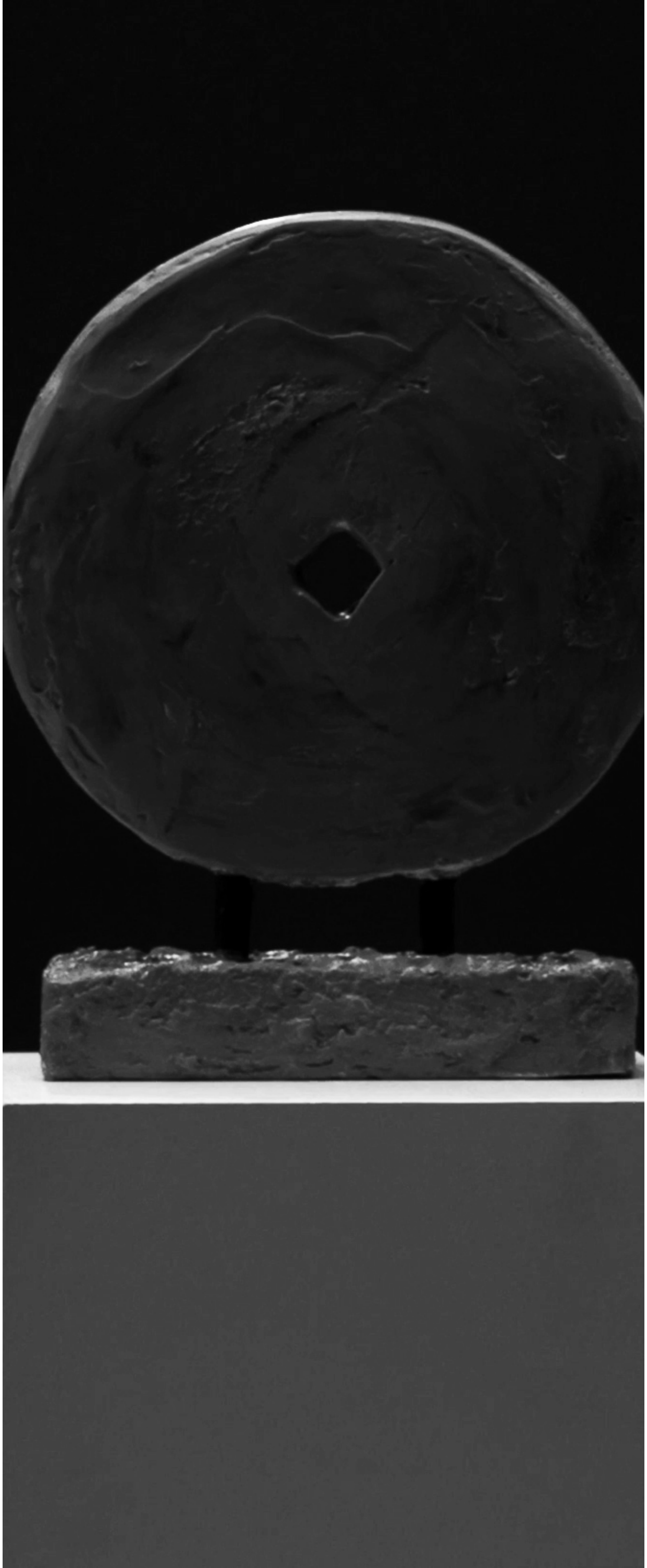
- Business Networking Introductions
- Employee Retirement Plan Consulting
- Business Sale Planning, Modeling & Analysis

Debt Management

- Lines of Credit
- Loan Rate & Terms Comparison Services
- Loan Refinancing Benefit Analysis

Estate Administrative Tasks

- Crummey Notice Signature Coordination
- Maintain Repository of Financial Records
- Insurance Premium Payment Coordination
- Retirement Plan Analysis
- College Savings Planning



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Let's talk.

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