

**Part 2B of Form ADV: Brochure Supplement**

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Wilmington Trust Investment Advisors, Inc.  
Wilmington Trust Center  
1100 North Market Street  
Wilmington, DE 19890  
302-651-8118  
[www.wtia.com](http://www.wtia.com)

February 27, 2025

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**Anthony M. “Tony” Roth**

Radnor Financial Center  
150 N. Radnor Chester Road  
Suite E-300  
Wayne, PA 19087  
1-800-878-0668

This Form ADV Part 2B brochure supplement provides information about Anthony M. “Tony” Roth that supplements the Wilmington Trust Investment Advisers (“WTIA”) ADV Brochure. Please contact WTIM’s Chief Compliance Officer, Andrew Baldauf, at 732-476-6003 or via email at [abaldauf@mtb.com](mailto:abaldauf@mtb.com), if you did not receive the WTIM SMA ADV Brochure or if you have any questions about the contents of this supplement.

Additional information about the above-named professional is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Anthony M. “Tony” Roth

Senior Executive Vice President - Chief Investment Officer

### Item 2- Educational Background and Business Experience

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Year of Birth: 1967

Education: J.D., Harvard Law School,  
Masters, French and International Tax Law from Université  
Panthéon Sorbonne,  
B.A., Philosophy from Brown University.

Business Background: 2014-Present, Wilmington Trust Investment Advisors  
Chief Investment Officer  
2013-2014, Aquitaine Management  
Chief Investment Officer  
2010-2013, UBS  
Chief Investment Officer, Private Wealth

### Item 3- Disciplinary Information

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Mr. Roth has no disciplinary disclosures to be reported.

### Item 4- Other Business Activities

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Mr. Roth is currently not actively engaged in any other investment related business or occupation.

### Item 5- Additional Compensation

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In addition, to his regular salary, Mr. Roth may receive incentive compensation from Wilmington Trust that is based on both quantifiable criteria and discretionary criteria. The incentive compensation is calculated as a multiple of Mr. Roth’s salary, tied to his area of responsibility.

### Item 6- Supervision

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Lisa Roberts is responsible for the supervision and oversight of Mr. Roth. Ms. Roberts is the Executive Vice President of Wilmington Trust Wealth Management and oversees the investment management activities performed by Mr. Roth through reports, discussions and meetings relating to investment management. Ms. Roberts can be reached at 1-212-965-5918

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February 27, 2025

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Walter J. Dillingham Jr.  
350 Park Avenue  
9<sup>th</sup> Floor  
New York, NY 10022  
212-415-0520

This Brochure Supplement provides information about the above-named professional that supplements Wilmington Trust Investment Advisors, Inc. (“WTIA”) brochure. You should have received a copy of that brochure. If you did not receive a copy of the WTIA brochure, or if you have any questions about the contents of this supplement, please contact WTIA at 302-651-8118.

Additional information about the above-named professional is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Walter J. Dillingham Jr.**

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Senior Vice President – Director of Endowments and Foundations

### **Item 2- Educational Background and Business Experience**

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Year of Birth: 1960

Education: B.A, Economics, Bates College  
M.S, Philanthropy, New York University  
MBA, Finance, Babson College

Business Background: 2010 - Present, Wilmington Trust, N.A.  
Senior Private Client Advisor  
2000 – 2010, Bank of America  
Business Development Officer

Professional Designations: CFA (Chartered Financial Analyst)<sup>(1)</sup>

### **Item 3- Disciplinary Information**

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Mr. Dillingham has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

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Mr. Dillingham is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

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Mr. Dillingham receives compensation solely from his responsibilities at Wilmington Trust and from no other source.

### **Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Stephen Seivold, Vice President and Institutional Portfolio Manager of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Dillingham as they relate to the management of WTIA client accounts.

- (1) The Chartered Financial Analyst (CFA) designation is issued by the CFA Institute to those candidates who meet one of the following requirements: (i) undergraduate degree and 4 years of professional experience involving investment decision-making, or (ii) 4 years qualified work experience (full time, but not necessarily investment related). Candidates must also complete 250 hours of study for each of the 3 levels and pass three course examinations.

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February 27, 2025

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Joel Christopher DiMartino  
350 Park Avenue  
9<sup>th</sup> Floor  
New York, NY 10022  
212-415-0520

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Additional information about the above-named professional is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Joel Christopher DiMartino**

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Senior Vice President - Senior Wealth Investment Advisor

### **Item 2- Educational Background and Business Experience**

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Year of Birth: 1975

Education: B.A, Economics, Bates College  
M.S, Philanthropy, New York University  
MBA, Finance, Babson College

Business Background: 2001 - Present, Wilmington Trust, N.A.  
Senior Private Client Advisor  
2000 – 2010, Bank of America  
Business Development Officer

### **Item 3- Disciplinary Information**

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Mr. DiMartino has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

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Mr. DiMartino is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

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Mr. DiMartino receives compensation solely from his responsibilities at Wilmington Trust and from no other source.

### **Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Stephen Seivold Vice President and Institutional Portfolio Manager of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. DiMartino as they relate to the management of WTIA client accounts.

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February 27, 2025

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**Matthew D. Glaser**  
Wilmington Trust Center  
1100 North Market Street  
Wilmington, DE 19890  
1-800-441-7120

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**Matthew D. Glaser, CFA**

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Executive Vice President -Head of Equity and Non-traditional Investments

**Item 2- Educational Background and Business Experience**

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Year of Birth: 1965

Education: B.A. History, Wesleyan University  
M.B.A. Columbia University

Business Background: 2016-Present, Wilmington Trust Investment Advisors, Inc.  
Head of Equity & Non-Traditional Investments  
2014 to 2016, Lazard Asset Management  
Managing Director and Portfolio Manager  
2007 to 2013, Turner Investments  
Chief of Investment Strategies and Executive Managing Director

**Item 3- Disciplinary Information**

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Mr. Glaser has no disciplinary disclosures to be reported.

**Item 4- Other Business Activities**

---

Mr. Glaser is currently not actively engaged in any other investment related business or occupation.

**Item 5- Additional Compensation**

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Mr. Glaser receives compensation solely from his responsibilities at Wilmington Trust Investment Advisors and from no other source.

**Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Anthony "Tony" Roth, President of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Glaser.

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**John M. Helinski**  
15 South Franklin Street, 7<sup>th</sup> Floor  
Wilkes-Barre, PA 18701  
570-821-8603

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## **John M. Helinski**

Senior Vice President -Senior Wealth Investment Advisor

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### **Item 2- Educational Background and Business Experience**

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Year of Birth: 1958

Education: B.S. Business Administration, King's College

Business Background: 2012 - Present, Wilmington Trust  
Vice President and Senior Investment Advisor  
2011 – 2012, Merrill Lynch Wealth Management  
Financial Advisor  
1980 – 2008, Bank of New York Mellon Wealth Management,  
Vice President and Senior Portfolio Officer

### **Item 3- Disciplinary Information**

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Mr. Helinski has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

---

Mr. Helinski currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

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Mr. Helinski receives compensation solely from his responsibilities at Wilmington Trust and from no other source.

### **Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Stephen Seivold Vice President and Institutional Portfolio Manager of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Helinski as they relate to the management of WTIA client accounts.

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Andrew H. Hopkins  
Wilmington Trust Center  
1100 North Market Street  
Wilmington, DE 19801  
1-800-441-7120

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## **Andrew H. Hopkins, CFA**

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Senior Vice President and Head of Equity Research

### **Item 2- Educational Background and Business Experience**

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Year of Birth:	1964
Education:	B.S. Finance, Goldey Beacom College M.B.A. Wilmington University
Business Background:	2008 - Present, Wilmington Trust Investment Advisors, Inc. Administrative Vice President and Head of Equity Research
Professional Designations:	CFA (Chartered Financial Analyst) <sup>(1)</sup>

### **Item 3- Disciplinary Information**

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Mr. Hopkins has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

---

Mr. Hopkins is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

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Mr. Hopkins receives compensation solely from his responsibilities at Wilmington Trust Investment Advisors and from no other source.

### **Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Matthew Glaser, Head of Equity of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Hopkins as they relate to the management of WTIA client accounts.

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Kyle Larson  
One Fountain Plaza  
Buffalo, New York  
1-800-441-7120

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## **Kyle Larson, CFA**

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Senior Vice President - Senior Wealth Investment Advisor

### **Item 2- Educational Background and Business Experience**

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Year of Birth:	1986
Education:	BA in Business Management – Arizona State University MBA – University of North Dakota
Business Background:	2021 - Present, Wilmington Trust Investment Advisor 2019-2021, Charles Schwab Financial Consultant 2018-2019, JP Morgan Portfolio Manager 2009-2018, Wells Fargo Premier Banker

### **Item 3- Disciplinary Information**

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Mr. Larson has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

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Mr. Larson is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

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Mr. Larson receives compensation solely from his responsibilities at Wilmington Trust and from no other source.

### **Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Stephen Seivold, Vice President and Institutional Portfolio Manager of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Lawson as they relate to the management of WTIA client accounts.

The Chartered Financial Analyst (CFA) designation is issued by the CFA Institute to those candidates who meet one of the following requirements: (i) undergraduate degree and 4 years of professional experience involving investment decision-making, or (ii) 4 years qualified work experience (full time, but not necessarily investment related). Candidates must also complete 250 hours of study for each of the 3 levels and pass three course examinations.



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**John Lawson**  
350 Park Avenue  
9<sup>th</sup> Floor  
New York, NY 10022  
212-415-0500

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## John Lawson

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Senior Vice President - Senior Wealth Investment Advisor

### Item 2- Educational Background and Business Experience

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Year of Birth: 1970

Education: B.A., Liberal Arts (Economics & History), Bucknell University  
MBA, Finance, Fordham University

Business Background: 2010 - Present, Wilmington Trust  
Investment Advisor  
2007 – 2010, Bank of America (US Trust)  
Portfolio Strategist

### Item 3- Disciplinary Information

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Mr. Lawson has no disciplinary disclosures to be reported.

### Item 4- Other Business Activities

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Mr. Lawson is currently not actively engaged in any other investment related business or occupation.

### Item 5- Additional Compensation

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Mr. Lawson receives compensation solely from his responsibilities at Wilmington Trust and from no other source.

### Item 6 - Supervision

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Stephen Seivold, Vice President and Institutional Portfolio Manager of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Lawson as they relate to the management of WTIA client accounts.



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February 27, 2025

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John J. Malloy, Jr.  
Wilmington Trust Center  
1100 North Market Street  
Wilmington, DE 19890  
1-800-441-7120

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**John J. Malloy, Jr.**

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Senior Vice President, Senior Fixed Income Municipal Portfolio Manager

**Item 2- Educational Background and Business Experience**

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Year of Birth: 1975

Education: B.A. Health Administration, Arcadia University  
M.B.A. Business, Saint Joseph's University

Business Background: 2006- Present, Wilmington Trust Investment Advisors, Inc.  
Vice President, Municipal Portfolio Manager

**Item 3- Disciplinary Information**

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Mr. Malloy has no disciplinary disclosures to be reported.

**Item 4- Other Business Activities**

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Mr. Malloy is currently not actively engaged in any other investment related business or occupation.

**Item 5- Additional Compensation**

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Mr. Malloy receives compensation solely from his responsibilities at Wilmington Trust Investment Advisors and from no other source.

**Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Randy Vogel, Administrative Vice President and Head of Fixed Income of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Malloy as they relate to the management of WTIA client accounts.

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February 27, 2025

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Eugene J Paloni, Jr.  
Wilmington Trust Center  
1100 North Market Street  
Wilmington, DE 19890  
1-800-441-7120

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## **Eugene J Paloni, Jr., CFA**

Vice President – Fixed Income Portfolio Manager

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### **Item 2- Educational Background and Business Experience**

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Year of Birth:	1965
Education:	B.S. Accounting, Widener University
Business Background:	2009 - Present, Wilmington Trust Investment Advisors, Inc. Vice President and Portfolio Manager
Professional Designations:	CFA (Chartered Financial Analyst) <sup>(1)</sup>

### **Item 3- Disciplinary Information**

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Mr. Paloni has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

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Mr. Paloni is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

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Mr. Paloni receives compensation solely from his responsibilities at Wilmington Trust Investment Advisors and from no other source.

### **Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Joseph Fahey, Vice President and Senior Fixed Income Portfolio Manager of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Paloni as they relate to the management of WTIA client accounts.

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Tom Pierce  
One Light Street  
Baltimore, MD 21201  
1-800-878-0668

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Additional information about the above-named professional is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Tom Pierce, CFA**

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Senior Vice President - Fixed Income Search & Strategist

### **Item 2- Educational Background and Business Experience**

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Year of Birth: 1960

Education: M.B.A., University of Chicago  
B.A. Economics, Washington University

Business Background: 2006- Present, Wilmington Trust Investment Advisors, Inc.  
Group Vice President

Professional Designations: CFA (Chartered Financial Analyst)<sup>(1)</sup>

### **Item 3- Disciplinary Information**

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Mr. Pierce has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

---

Mr. Pierce is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

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Mr. Pierce receives compensation solely from his responsibilities at Wilmington Trust Investment Advisors and from no other source.

### **Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Mathew Glaser, Senior Vice President of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Pierce as they relate to the management of WTIA client accounts.

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**Louis Porta**

277 Park Avenue, 26<sup>th</sup> Floor  
New York, NY 10172  
1-732-476-6138

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Additional information about the above-named professional is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Louis Porta, CFA®, CIMA®, CFP®, CAIA®

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Managing Director, Senior Investment Advisor

### Item 2- Educational Background and Business Experience

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Year of Birth: 1971

Education: MBA in Finance – Fordham University, Gabelli School of Business  
Bachelor of Business Administration - Pace University

Business Background: 2023 - Present, Wilmington Trust, Senior Investment Advisor  
2022 - 2023, PNC Private Bank Hawthorn, Senior Investment Advisor  
2021-2022, Rockefeller Capital Management, Sr. Financial Advisor  
2018-2021, Merrill Lynch, Senior Financial Advisor, Managing Director  
2001-2018, Bank of America Private Bank, Market Investment Director/Portfolio Manager

Professional Designations: CFA (Chartered Financial Analyst)<sup>(1)</sup>  
Certified Investment Management Analyst  
Certified Financial Planner  
Chartered Alternative Investment Analyst

### Item 3- Disciplinary Information

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Mr. Pierce has no disciplinary disclosures to be reported.

### Item 4- Other Business Activities

---

Mr. Pierce is currently not actively engaged in any other investment related business or occupation.

### Item 5- Additional Compensation

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Mr. Pierce receives compensation solely from his responsibilities at Wilmington Trust Investment Advisors and from no other source.

### Item 6 - Supervision

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Christopher Sporic, Managing Director and Vice President of Wilmington Trust Investment Management, LLC (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Porta as they relate to the management of WTIA client accounts.

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**Karen R. Purzitsky**  
Wilmington Trust Center  
1100 North Market Street  
Wilmington, DE 19801  
1-800-441-7120

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## **Karen R. Purzitsky**

Vice President – Equity Portfolio Manager

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### **Item 2- Educational Background and Business Experience**

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Year of Birth: 1972

Education: M.B.A. Finance, Accounting, University of Rochester  
B.A. Economics, Mathematics, York University

Business Background: 2001 - Present, Wilmington Trust Investment Advisors, Inc.  
Vice President  
1998 – 2001, M&T Bank  
Assistant Vice President

Professional Designations: CFA (Chartered Financial Analyst)<sup>(1)</sup>

### **Item 3- Disciplinary Information**

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Ms. Purzitsky has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

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Ms. Purzitsky is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

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Ms. Purzitsky receives compensation solely from his responsibilities at Wilmington Trust and from no other source.

### **Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Andrew Hopkins, Head of Equity Research of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Ms. Purzitsky as they relate to the management of WTIA client accounts.

- (1) The Chartered Financial Analyst (CFA) designation is issued by the CFA Institute to those candidates who meet one of the following requirements: (i) undergraduate degree and 4 years of professional experience involving investment decision-making, or (ii) 4 years qualified work experience (full time, but not necessarily investment related). Candidates must also complete 250 hours of study for each of the 3 levels and pass three course examinations.

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Wilmington Trust Center  
1100 North Market Street  
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February 27, 2025

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Zia E Qasim  
Wilmington Trust Center  
1100 North Market Street  
Wilmington, DE 19890  
1-800-441-7120

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## **Zia E Qasim**

---

Senior Vice President -Senior Fixed Income Portfolio Manager

### **Item 2- Educational Background and Business Experience**

---

Year of Birth: 1979

Education: B.A. Economic, University of Delaware  
M.S. International Business, University of Delaware  
M.B.A. University of Delaware

Business Background: 2007 - Present, Wilmington Trust Investment Advisors, Inc.  
Vice President, Portfolio Manager  
2005 – 2007, The Vanguard Group  
Trader  
2003 -2005 Wilmington Trust Investment Advisors, Inc.  
Trader

### **Item 3- Disciplinary Information**

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Mr. Qasim has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

---

Mr. Qasim is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

---

Mr. Qasim receives compensation solely from his responsibilities at Wilmington Trust Investment Advisors and from no other source.

### **Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Joseph Fahey, Vice President and Senior Fixed Income Portfolio Manager of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Qasim as they relate to the management of WTIA client accounts.

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February 27, 2025

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Susan L. Schnaars  
One Light Street  
Baltimore, MD 21201  
1-800-878-0668

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Additional information about the above-named professional is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Susan L. Schnaars, CFA, CPA**

Senior Vice President – Senior Wealth Investment Advisor

---

### **Item 2- Educational Background and Business Experience**

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Year of Birth: 1962

Education: M.S. Finance, Drexel University  
B.S. Accounting & Finance, Drexel University

Business Background: 2012 – Present, M&T Bank  
Vice President Wealth Advisory Services  
1995 - 2012, Wilmington Trust Investment Advisors, Inc.  
Senior Portfolio Manager  
1992- 1995, First National Bank of Maryland  
Senior Portfolio Manager

Professional Designations: CFA (Chartered Financial Analyst)<sup>(1)</sup>  
CPA (Certified Public Accountant)<sup>(2)</sup>

### **Item 3- Disciplinary Information**

---

Ms. Schnaars has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

---

Ms. Schnaars is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

---

Ms. Schnaars receives compensation solely from her responsibilities at Wilmington Trust Investment Advisors and from no other source.

### **Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Stephen Seivold, Vice President and Institutional Portfolio Manager of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Ms. Schnaars as they relate to the management of WTIA client accounts.

- (1) The Chartered Financial Analyst (CFA) designation is issued by the CFA Institute to those candidates who meet one of the following requirements: (i) undergraduate degree and 4 years of professional experience involving investment decision-making, or (ii) 4 years qualified work experience (full time, but not necessarily investment related. Candidates must also complete 250 hours of study for each of the 3 levels and pass three course examinations.
- (2) Certified Public Accountant (CPA) is the statutory title of qualified accountants in the United States who have passed the Uniform Certified Public Accountant Examination and have met additional state education and experience requirements for certification as a CPA.

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February 27, 2025

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Stephen Seivold  
One Light Street  
Baltimore, MD 21202  
1-800-878-0668

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## **Stephen Seivold**

---

Senior Vice President -Senior Wealth Investment Advisor

### **Item 2- Educational Background and Business Experience**

---

Year of Birth: 1968

Education: B.A. Politics & Government, Ohio Wesleyan University

Business Background: 2007- Present, Wilmington Trust Investment Advisors, Inc.  
Vice President & Institutional Portfolio Manager  
2000- 2007, T. Rowe Price, Registered Representative

### **Item 3- Disciplinary Information**

---

Mr. Seivold has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

---

Mr. Seivold is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

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Mr. Seivold receives compensation solely from his responsibilities at Wilmington Trust Investment Advisors and from no other source.

### **Item 6 - Supervision**

---

Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Christopher Sporcic, Managing Director and Vice President of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Seivold as they relate to the management of WTIA client accounts.

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February 27, 2025

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Eric Smookler  
Wilmington Trust Center  
1100 North Market Street  
Wilmington, DE 19801  
1-800-441-7120

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## **Eric Smookler**

---

Vice President Senior Research Analyst

### **Item 2- Educational Background and Business Experience**

---

Year of Birth: 1963

Education: B.S. Finance, University of Maryland

Business Background: 2007- Present, Wilmington Trust Investment Advisors, Inc.  
Vice President & Institutional Portfolio Manager  
2000- 2007, T. Rowe Price, Registered Representative

### **Item 3- Disciplinary Information**

---

Mr. Smookler has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

---

Mr. Smookler is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

---

Mr. Smookler receives compensation solely from his responsibilities at Wilmington Trust Investment Advisors and from no other source.

### **Item 6 - Supervision**

---

Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Randy Vogel , Executive Vice President and Head of Fixed Income of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Smookler as they relate to the management of WTIA client accounts.

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Christopher A. Sporcic  
213 Market Street  
Harrisburg, PA 17101  
1-800-878-0668

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Additional information about the above-named professional is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Christopher A. Sporcic**

Senior Vice President - Senior Institutional Portfolio Manager

---

### **Item 2- Educational Background and Business Experience**

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Year of Birth:	1978
Education:	M.B.A., Duke University B.S. Physics, Bates College
Business Background:	2010- Present, Wilmington Trust Investment Advisors, Inc., Vice President & Managing Director 2010, DUMAC, LLC Equity Research Intern 2009, Oak Value Capital Management Equity Research Intern 2006- 2008, Fidelity Investments Senior Product Manager

### **Item 3- Disciplinary Information**

---

Mr. Sporcic has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

---

Mr. Sporcic is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

---

Mr. Sporcic receives compensation solely from his responsibilities at Wilmington Trust Investment Advisors and from no other source.

### **Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Matthew Glaser, Head of Equity and Nontraditional Investments of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Sporcic as they relate to the management of WTIA client accounts.

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Mark Stevenson  
1423 North Atherton Street  
State College, PA 16803  
1-800-878-0668

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## **Mark Stevenson, CFA**

Senior Vice President - Senior Wealth Investment Advisor

---

### **Item 2- Educational Background and Business Experience**

---

Year of Birth: 1961

Education: M.A. International Economics and U.S. Foreign Policy,  
American University at Washington D.C.  
B.A. Pre-Law, Penn State University

Business Background: 2006- Present, Wilmington Trust Investment Advisors, Inc.  
Senior Portfolio Manager

Professional Designations: CFA (Chartered Financial Analyst)<sup>(1)</sup>

### **Item 3- Disciplinary Information**

---

Mr. Stevenson has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

---

Mr. Stevenson is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

---

Mr. Stevenson receives compensation solely from his responsibilities at Wilmington Trust Investment Advisors and from no other source.

### **Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Stephen Seivold, Vice President and Institutional Portfolio Manager of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Stevenson as they relate to the management of WTIA client accounts.

- (1) The Chartered Financial Analyst (CFA) designation is issued by the CFA Institute to those candidates who meet one of the following requirements: (i) undergraduate degree and 4 years of professional experience involving investment decision-making, or (ii) 4 years qualified work experience (full time, but not necessarily investment related). Candidates must also complete 250 hours of study for each of the 3 levels and pass three course examinations.

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February 27, 2025

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Wilmer C. Stith, III  
Wilmington Trust Center  
1100 North Market Street  
Wilmington, DE 19801  
1-800-441-7120

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Additional information about the above-named professional is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).



## **Wilmer C. Stith, III, CFA**

---

Senior Vice President - Senior Fixed Income Portfolio Manager

### **Item 2- Educational Background and Business Experience**

---

Year of Birth: 1966

Education: M.B.A., Loyola College in Maryland  
B.A. Economics & Russian Studies, Kenyon College

Business Background: 1995- Present, Wilmington Trust Investment Advisors, Inc.  
Vice President & Senior Fixed Income Portfolio Manager

Professional Designations: CFA (Chartered Financial Analyst)<sup>(1)</sup>

### **Item 3- Disciplinary Information**

---

Mr. Stith, III has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

---

Mr. Stith, III is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

---

Mr. Stith, III receives compensation solely from his responsibilities at Wilmington Trust Investment Advisors and from no other source.

### **Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. James Hannan, Administrative Vice President and Senior Fixed Income Portfolio Manager of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Stith as they relate to the management of WTIA client accounts.

- (1) The Chartered Financial Analyst (CFA) designation is issued by the CFA Institute to those candidates who meet one of the following requirements: (i) undergraduate degree and 4 years of professional experience involving investment decision-making, or (ii) 4 years qualified work experience (full time, but not necessarily investment related). Candidates must also complete 250 hours of study for each of the 3 levels and pass three course examinations.

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February 27, 2025

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Jordan Strauss  
Wilmington Trust Center  
1100 North Market Street  
Wilmington, DE 19801  
1-800-441-7120

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Additional information about the above-named professional is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Jordan Strauss

---

Senior Vice President - Senior Equity Portfolio Manager

### Item 2- Educational Background and Business Experience

---

Year of Birth: 1977

Education: B.S. Mathematics and History, University of Vermont  
M.S. Electrical Engineering, Columbia University

Business Background: 2014 - Present, Wilmington Trust Investment Advisors, Inc.  
Administrative Vice President & Senior Portfolio Manager  
2013 - 2014, PNC Bank  
Vice President  
2008 - 2013, Lionstone Capital Management  
Analyst  
2004 – 2008, Natixis  
Analyst

Professional Designations: CFA (Chartered Financial Analyst)<sup>(1)</sup>

### Item 3- Disciplinary Information

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Mr. Strauss has no disciplinary disclosures to be reported.

### Item 4- Other Business Activities

---

Mr. Strauss is currently not actively engaged in any other investment related business or occupation.

### Item 5- Additional Compensation

---

Mr. Strauss receives compensation solely from his responsibilities at Wilmington Trust and from no other source.

### Item 6 - Supervision

---

Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Matthew Glaser, Head of Equity of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Strauss as they relate to the management of WTIA client accounts.

- (1) The Chartered Financial Analyst (CFA) designation is issued by the CFA Institute to those candidates who meet one of the following requirements: (i) undergraduate degree and 4 years of professional experience involving investment decision-making, or (ii) 4 years qualified work experience (full time, but not necessarily investment related). Candidates must also complete 250 hours of study for each of the 3 levels and pass three course examinations.

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Sarah Friedman Hersh  
Radnor Financial Center  
150 N. Radnor Chester Road  
Suite E-300  
Wayne, PA 19087  
1-800-878-0668

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Additional information about the above-named professional is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Sarah Friedman Hersh**

---

Senior Vice President -Head of Sustainable Investing and Senior Portfolio Manager

### **Item 2- Educational Background and Business Experience**

---

Year of Birth: 1988

Education: B.A. International Studies. Kenyon College  
MBA, Yale School of Management

Business Background: 2024 - Present, Wilmington Trust Investment Advisors, Inc.  
Head of Sustainable Investing and Senior Portfolio Manager

2023-2024, Vanguard- Head of US/Enterprise ESG  
2022-2023 , Vanguard -Senior Manager, Global ESG Product  
2020-2022 Vanguard – Senior Manager, ESG Product Management , 2017-  
2020 Vanguard Investment Stewardship Director/Strategist

### **Item 3- Disciplinary Information**

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Ms. Friedman Hersh has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

---

Ms. Friedman Hersh is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

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Ms. Friedman Hersh receives compensation solely from his responsibilities at Wilmington Trust Investment Advisors and from no other source.

### **Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Matt Glaser, Executive Vice President -Head of Equity and Non-traditional Investments

(800-878-0668), is directly responsible for supervising the advisory activities of Ms. Friedman Hersh as they relate to the management of WTIA client accounts.

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Joanna Swatik  
One Light Street  
Baltimore, MD 21201  
410-244-3755

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Additional information about the above-named professional is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Joanna Swatik**

---

Senior Vice President – Senior Wealth Investment Advisor

### **Item 2- Educational Background and Business Experience**

---

Year of Birth:	1976
Education:	B.A. Economics, University of Virginia M.B.A. Duke University Certificate of Completion (Private Equity and Venture Capital) Harvard Business School
Business Background:	2013- Present, Wilmington Trust Investment Advisor 2009-2010, Independent Financial & Strategic Consultant

### **Item 3- Disciplinary Information**

---

Ms. Swatik has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

---

Ms. Swatik is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

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Ms. Swatik receives compensation solely from his responsibilities at Wilmington Trust and from no other source.

### **Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Stephen Seivold, Vice President and Institutional Portfolio Manager of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Ms. Swatik as they relate to the management of WTIA client accounts.



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Wendy M. White  
Wilmington Trust Center  
1100 North Market Street  
Wilmington, DE 19890  
1-800-441-7120

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**Wendy M. White,**

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Senior Vice President – Senior Fixed Income Portfolio Manager

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**Item 2- Educational Background and Business Experience**

---

Year of Birth: 1967

Education: B.S. Business Administration, University of Delaware  
M.B.A. University of Delaware

Business Background: 1997 - Present, Wilmington Trust Investment Advisors, Inc.  
Vice President, Senior Portfolio Manager

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**Item 3- Disciplinary Information**

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Ms. White has no disciplinary disclosures to be reported.

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**Item 4- Other Business Activities**

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Ms. White is currently not actively engaged in any other investment related business or occupation.

---

**Item 5- Additional Compensation**

---

Ms. White receives compensation solely from her responsibilities at Wilmington Trust Investment Advisors and from no other source.

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**Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Joseph Fahey, Vice President and Senior Fixed Income Portfolio Manager of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Ms. White as they relate to the management of WTIA client accounts.

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David Edward Wolf  
One Light Street  
Baltimore, MD 21202  
410-545-2253

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Additional information about the above-named professional is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **David Edward Wolf**

---

Senior Vice President – Senior Wealth Investment Officer

### **Item 2- Educational Background and Business Experience**

---

Year of Birth:	1964
Education:	B.S. Finance, Towson State University M.B.A. University of Baltimore
Business Background:	2009 - Present, Wilmington Trust Investment Officer

### **Item 3- Disciplinary Information**

---

Mr. Wolf has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

---

Mr. Wolf is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

---

Mr. Wolf receives compensation solely from his responsibilities at Wilmington Trust and from no other source.

### **Item 6 - Supervision**

---

Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Stephen Seivold, Vice President and Institutional Portfolio Manager of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Wolf as they relate to the management of WTIA client accounts.

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Wilmington Trust Investment Advisors, Inc.  
Wilmington Trust Center  
1100 North Market Street  
Wilmington, DE 19890  
302-651-8118  
[www.wtia.com](http://www.wtia.com)

February 27, 2025

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**Devon Bruce**  
300 Great Oaks Boulevard, Suite 327  
Albany, NY 12203  
518-464-6196

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Additional information about the above-named professional is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Devon Bruce**

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Senior Vice President – Senior Wealth Investment Officer

**Item 2- Educational Background and Business Experience**

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Year of Birth:	1964
Education:	B.S. Finance, Towson State University M.B.A. University of Baltimore
Business Background:	2009 - Present, Wilmington Trust Investment Officer

**Item 3- Disciplinary Information**

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Mr. Bruce has no disciplinary disclosures to be reported.

**Item 4- Other Business Activities**

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Mr. Bruce is currently not actively engaged in any other investment related business or occupation.

**Item 5- Additional Compensation**

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Mr. Bruce receives compensation solely from his responsibilities at Wilmington Trust and from no other source.

**Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Stephen Seivold, Vice President and Institutional Portfolio Manager of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Bruce as they relate to the management of WTIA client accounts.

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Suzanne Wyant  
Wilmington Trust Center  
1100 North Market Street  
Wilmington, DE 19801  
1-800-441-7120

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## **Suzanne Wyant**

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Vice President – Fixed Income Portfolio Manager

### **Item 2- Educational Background and Business Experience**

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Year of Birth:	1961
Education:	B.S. Finance, west Chester University M.B.A. Widner University
Business Background:	2000- Present, Wilmington Trust Investment Advisors, Inc. Vice President, Fixed Income Portfolio Manager

### **Item 3- Disciplinary Information**

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Miss Wyant has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

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Miss Wyant is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

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Miss Wyant receives compensation solely from her responsibilities at Wilmington Trust and from no other source.

### **Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Joseph Fahey, Vice President and Senior Fixed Income Portfolio Manager of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Miss Wyant as they relate to the management of WTIA client accounts.

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Jerry Weidner  
350 Fore Street  
Portland, ME 04101  
1-800-441-7120

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## **Jerry Weidner**

Vice President – Wealth Investment Advisor

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### **Item 2- Educational Background and Business Experience**

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Year of Birth: 1987

Education: B.A, Finance, Seton Hall University

Business Background: 2022 - Present, Wilmington Trust, N.A.  
Wealth Investment Advisor  
2019 – 2022, People’s United Bank  
Client Portfolio Manager  
2010 – 2019, JPMorgan Asset Management

Professional Designations: CFA (Chartered Financial Analyst)<sup>(1)</sup>

### **Item 3- Disciplinary Information**

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Mr. Weidner has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

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Mr. Weidner is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

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Mr. Weidner receives compensation solely from her responsibilities at Wilmington Trust and from no other source.

### **Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm’s investment policies. Chris Sporcic, Senior Vice President - Senior Institutional Portfolio Manager of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Weidner as they relate to the management of WTIA client accounts.

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February 27, 2025

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Carly Nathanson  
277 Park avenue, 26t Floor  
New York, New Yor  
1-800-441-7120

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## **Carly Nathanson, CFA**

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Senior Vice President – Senior Investment Advisor

### **Item 2- Educational Background and Business Experience**

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Year of Birth: 1987

Education: B.A, Columbia University

Business Background: 2021 - Present, Wilmington Trust, N.A.  
2018-2021 -Banker, JP Morgan Private Bank  
2011-2018 – Portfolio Manager, Northern Trust

Professional Designations: CFA (Chartered Financial Analyst)<sup>(1)</sup>

### **Item 3- Disciplinary Information**

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Ms. Nathanson has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

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Ms. Nathanson is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

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Ms. Nathanson receives compensation solely from her responsibilities at Wilmington Trust and from no other source.

### **Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Chris Sporcic, Senior Vice President - Senior Institutional Portfolio Manager of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Ms. Nathanson as they relate to the management of WTIA client accounts.

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February 27, 2025

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Jason Hannon  
Rodney Square North  
1100 North Market Street – 9<sup>th</sup> Floor  
Wilmington, DE 09890-001  
1-800-441-7120

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Additional information about the above-named professional is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Jason Hannon, CFA**

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Senior Vice President – Head of Minicpal Strategy and Senior Portfolio Manager

### **Item 2- Educational Background and Business Experience**

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Year of Birth: 1983

Education: B.S. Finance, The Pennsylvania State University

Business Background: 2014-2019 Emigrant Bank / New York Private Bank & Trust  
2010-2014 Arbor Research & Trading  
2005-2010 Vanguard

Professional Designations: CFA (Chartered Financial Analyst)<sup>(1)</sup>

### **Item 3- Disciplinary Information**

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Mr. Hannon has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

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Mr. Hannon is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

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Mr. Hannon receives compensation solely from her responsibilities at Wilmington Trust and from no other source.

### **Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Chris Sporcic, Senior Vice President - Senior Institutional Portfolio Manager of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Hannon as they relate to the management of WTIA client accounts.

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February 27, 2025

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**Julian Freeman**  
150 North Radnor Center  
Chester Road, Suite E-120  
Radnor, PA 19087  
1-800-441-7120

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Additional information about the above-named professional is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Julian Freeman**

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Senior Vice President – Chief Operating Officer

### **Item 2- Educational Background and Business Experience**

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Year of Birth: 1985

Education: B.S. Economics and Finance, University of Hartford  
M.B.A. Darden School of Business

Business Background: 2024 – Present - Chief Operating Officer, Wilmington Trust Asset Management  
2013 - 2023 - Alternative Investments Research Analyst, Wilmington Trust Asset Management  
2007 – 2011 - United Technologies Corporation

### **Item 3- Disciplinary Information**

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Mr. Freeman has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

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Mr. Hannon is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

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Mr. Freeman receives compensation solely from her responsibilities at Wilmington Trust and from no other source.

### **Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Chris Sporcic, Senior Vice President - Senior Institutional Portfolio Manager of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Freeman as they relate to the management of WTIA client accounts.

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February 27, 2025

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**John Bradarich**  
10250 Constellation Boulevard  
Suite 2800  
Los Angeles, CA 90067  
1-800-441-7120

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## **John Bradarich**

Senior Vice President – Senior Wealth Investment Advisor

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### **Item 2- Educational Background and Business Experience**

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Year of Birth: 1985

Education: BBA Bachelor of Business Administration, Focus in Finance and Accounting - University of Michigan Ross School of Business

Business Background: 2022 - Present - Senior Investment Advisor -Wilmington Trust  
2018-2022 – Head of Investment Counselors and Senior IC at HSBC Private Bank  
2008-2018 - Investment Specialist – JP Morgan Private Bank

### **Item 3- Disciplinary Information**

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Mr. Bradarich has no disciplinary disclosures to be reported.

### **Item 4- Other Business Activities**

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Mr. Hannon is currently not actively engaged in any other investment related business or occupation.

### **Item 5- Additional Compensation**

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Mr. Bradarich receives compensation solely from her responsibilities at Wilmington Trust and from no other source.

### **Item 6 - Supervision**

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Wilmington Trust Investment Advisors Investment Strategy Team is responsible for overseeing the firm's investment policies. Chris Sporcic, Senior Vice President - Senior Institutional Portfolio Manager of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Bradarich as they relate to the management of WTIA client accounts.