



WORKING TOGETHER TOWARD A STRONGER FUTURE

Special Announcement

PATHSTONE STRATEGICALLY EXPANDS

We are thrilled to welcome former Convergent Wealth Advisors clients, advisors and staff to Pathstone Federal Street. On November 1, the Convergent team joined forces with Pathstone, further advancing our industry-leading advisory service and strengthening our ability to serve clients nationwide. The combination complements Pathstone's legacy of family office services and respected investment research capabilities with additional investment strategies, innovative resources and an outstanding network of talented advisors. Together, our teams bring the highest standard of objective client advice and a common embrace of the fiduciary standard designed to ensure our clients' interests always come first.

Our firm now serves 300 clients representing over \$9 billion in total assets under management. Our combined scale will give our advisors enhanced resources to better focus on clients' specific needs while also providing significant potential cost-saving opportunities and operating efficiencies.

The true strength of our organization, however, lies in our people. Our company is 30 partners and 105 employees strong, giving clients a comprehensive advisory experience from seven offices, coast to coast. Pathstone's commitment to remain employee owned and governed fosters a culture of increased accountability and stewardship. We believe this ownership structure will enable us to attract and retain some of the industry's brightest talent and incentivizes them to work together for our clients' best interests.

Over the next several months we will be making a number of exciting enhancements to our website including the new team biographies and a glimpse into what this combination will offer.

Please stay tuned and do not hesitate to contact us if you have any questions.