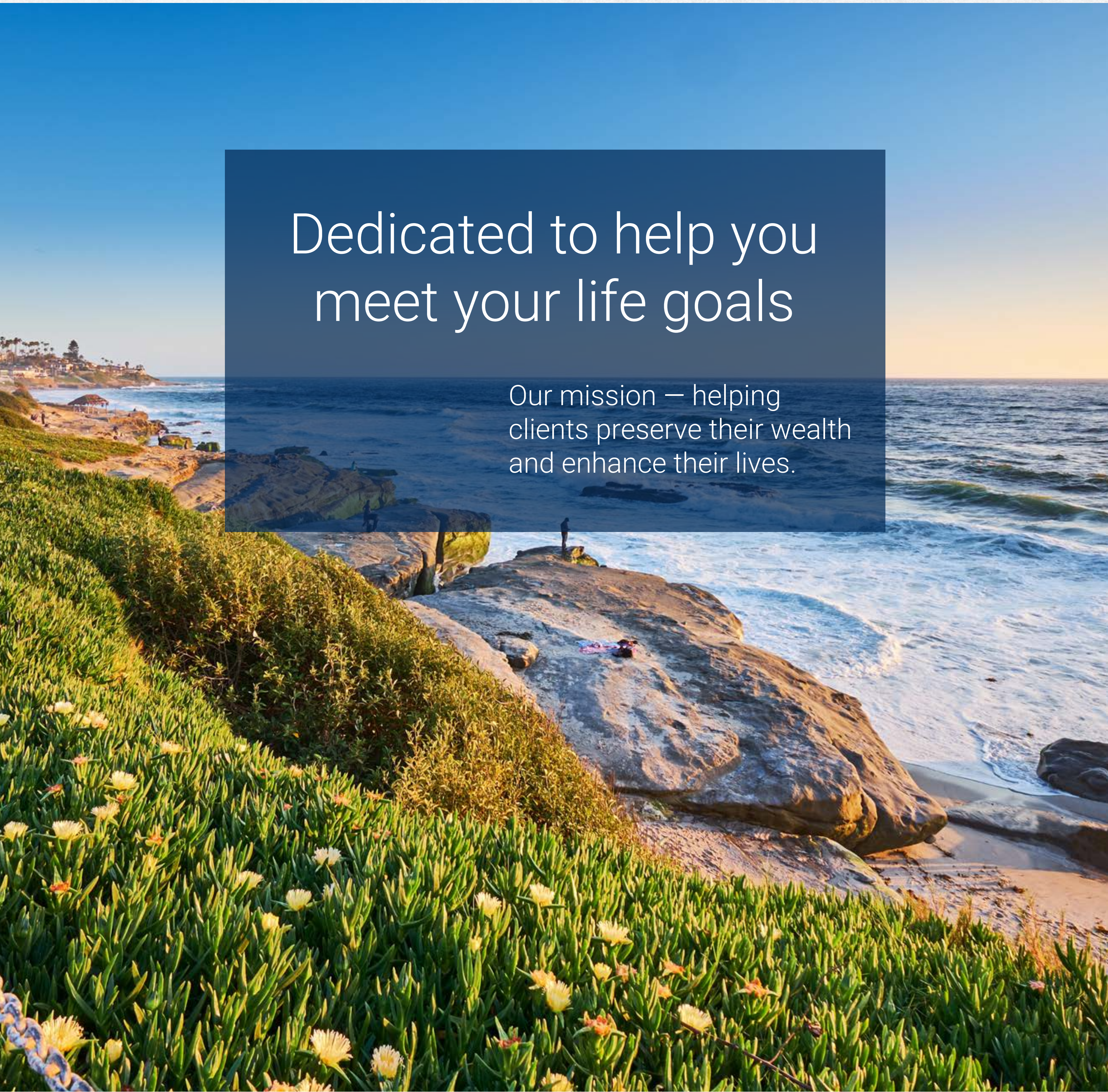
OPPENHEIMER THE AFFINITY GROUP



Dedicated to help you meet your life goals

Our mission — helping clients preserve their wealth and enhance their lives.

Why Work With Us

Investment Experience
We have the expertise and skills to understand your needs and, together, with the appropriate departmental professionals will help develop a comprehensive plan designed for you.

Independence
Our independence provides us the freedom to offer objective advice. With access to a full range of traditional and non-traditional investment products and services, we are committed to developing a strategy that is in your best interest.

Entrepreneurial Culture
We think ahead. Flexibility, short lines of communication and access to experts result in decisive action and tailored responses that are designed to help meet your unique financial goals and objectives.

Personal Relationship
We sit on the same side of the table as our clients and provide advice based on a deep understanding of their needs. Creating long-term relationships that are built on trust is our ultimate goal.

> We provide investment advisory and wealth management to a broad range of individuals, families and businesses.

Wealth Management Services
- Planning Services[1]
- Retirement Services
- Trust Services[2]
  - Estate and Succession Strategies
- Cash Management[3]
- Investment Consulting Services for Institutions and Individuals[4]
  - Customized Portfolio Analysis
  - Investment Policy Statement
  - Asset Allocation
  - Investment Manager Selection
  - Portfolio Construction
  - Consolidated Reporting
  - Manager Research and Due Diligence for Traditional and Alternative Investments

Investment Products and Services
- Equity Research
- Equity and Fixed Income Securities
- Exchange Traded Funds
- Options
- Mutual Funds
- Alternative Investments: Including Hedge Funds, Fund of Funds and Private Equity[5]
- Advisory Portfolios: Including Separate Accounts, Mutual Funds and ETFs[4]
- Sales of Restricted and Control Stock Strategies
- Hedging and Monetization Strategies
- Insurance and Annuities
- Retirement Plan Services
- Employee Stock Option Plans
- Employee Stock Purchase Plans
- Buybacks
- Deferred Compensation Plans
- Rule 10b5-1 Trading Plans

Team Leaders

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Anita D'Aguilar is a Director – Investments in the Los Angeles office of Oppenheimer & Co. Inc. She focuses in socially responsible investing, working closely with successful individuals and families who seek to align their financial strategies with their ethical and social priorities. With over 20 years of experience in finance and wealth management, Anita has advised corporate executives, family offices, women business owners, affluent families, and entertainment professionals on investment strategies that integrate financial growth with social impact.

Anita's approach includes a broad range of traditional, absolute return, and—where appropriate—alternative investments for qualified investors. Her expertise in socially responsible investments has earned her recognition within the investment community, allowing her to offer well-informed strategies that reflect her clients' financial goals and values.

Anita made a significant contribution to UBS introducing a beverage company purchased by Coca-Cola for $4.1B cash. Around 2007/2008 her team serviced the companies Family Office in an investment advisory role. Anita fostered a strong relationship with the company and senior management. She focuses in Comprehensive Financial Planning and have been published in magazines.

Feng Shen is a Director – Investments in the Oppenheimer Los Angeles office since 2021. She began her career in wealth management at Merrill Lynch, where she supported the firm's largest wealth management team in managing $6 billion in client assets. With over 24 years of experience in finance, Feng has built a strong reputation for providing customized financial strategies tailored to help clients achieve their long-term goals.

Focuses in comprehensive financial planning, investment management, and retirement strategies, Feng is committed to guiding clients through the complexities of wealth management with a focus on asset preservation and growth. Her clientele includes corporate executives, attorneys, physicians, and entrepreneurs. She employs a diverse range of financial instruments—including stocks, options, bonds, ETFs, mutual funds, hedge funds, and private equity—to construct well-rounded portfolios designed to address clients' financial objectives.

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2 Trust services are provided by Oppenheimer Trust Company of Delaware.

3 Available for Institutional Investors Only.

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5 Alternative investments, such as Hedge Equity & Fund of Funds, are made available only to qualified investors and involve varying degrees of risk.

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