ST. LOUIS TRUST
& Family Office

Sharing Our Knowledge in 2023

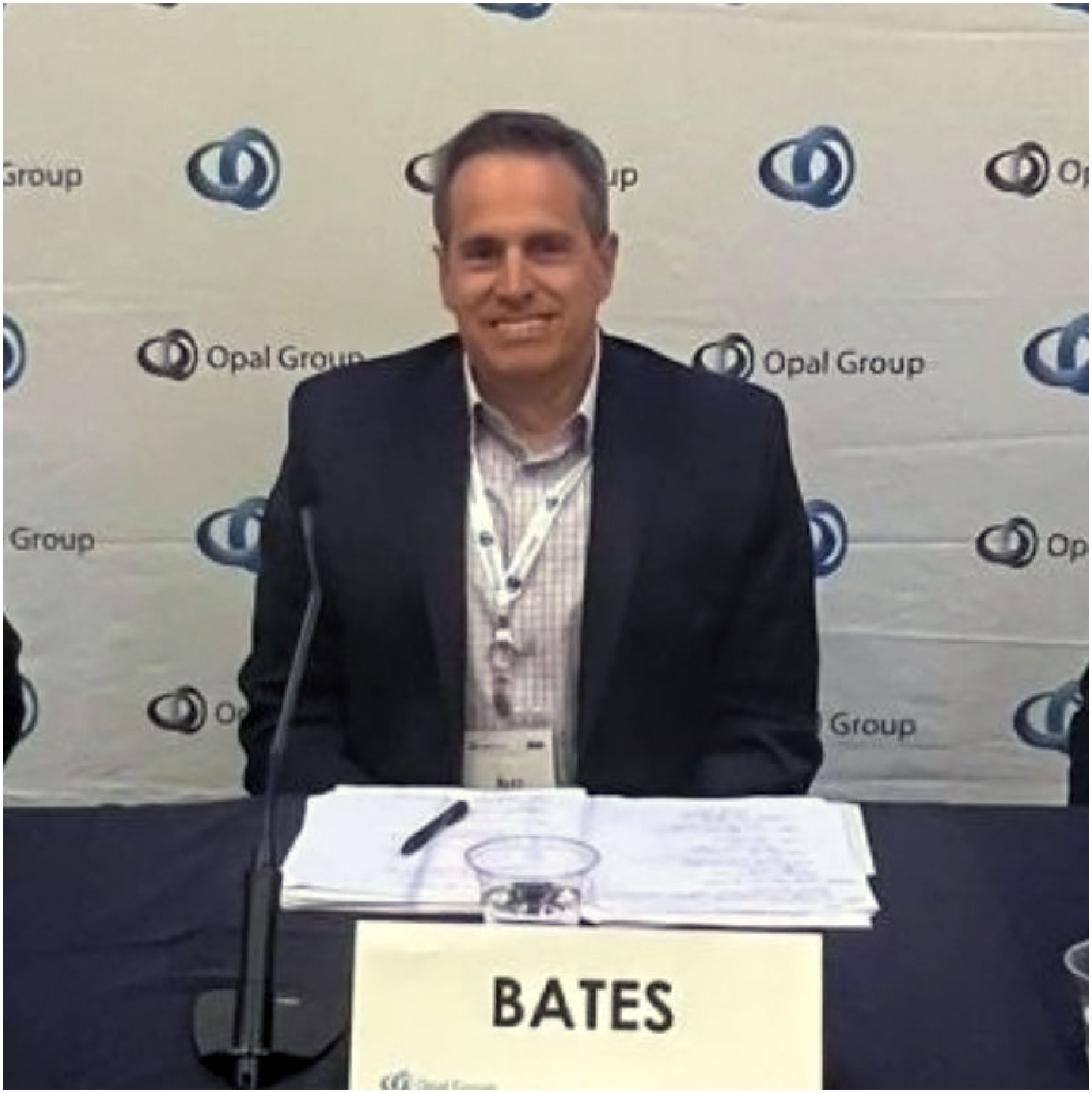
We are lucky to have many subject matter experts on our team who participate in industry-leading speaking engagements.

Our Director of Investment Research, **Alex Bates, CFAÂ®, CAIAÂ®**, spoke in the "Tracking the Smart Money: Family Office CIO/CEO Roundtable," a discussion about where they think the "smart money" is being invested and the best strategies for investors.

Our General Counsel, **Mike Bartolacci, JD**, spoke on "The Effective Use of Experts in Trust and Estate Litigationâ€• as part of the Missouri Barâ€™s Annual Probate, Trust and Elder Law Institute, where attendees reviewed the practical aspects of selecting, preparing and presenting testimony from expert witnesses in litigation matters involving trust and estate issues, including capacity/undue influence, breach of duty, and investment matters. He also spoke on â€œFiduciary Issues in Powers of Attorneyâ€• for the Bar Association of Metropolitan St. Louisâ€™s Fiduciary Litigation Seminar.

Jen Sanwald, JD, TEP, spoke for the Missouri Barâ€™s Annual Probate, Trust and Elder Law Institute, helping attendees navigate trust distribution language to identify the fiduciary obligations of and legal standards for corporate trustees in interpreting trust distribution language, as well as with understanding the potential consequences of vague or imprecise standards.

Our President, **John Jennings**, spoke for several organizations as part of his book promotion:Â the Nantucket Yacht Club, TIGER 21 in New York City, the Institute for Private Investors Conference in Washington, D.C., the Young Presidentâ€™s Organization (YPO) Investment Management Conference in Geneva, Switzerland, Private Wealth Management Summit sponsored by marcusevans Group (Keynote), the Young Presidentâ€™s Organization (YPO) Family Office Symposium in Miami, and the Mercer Panel in St. Louis.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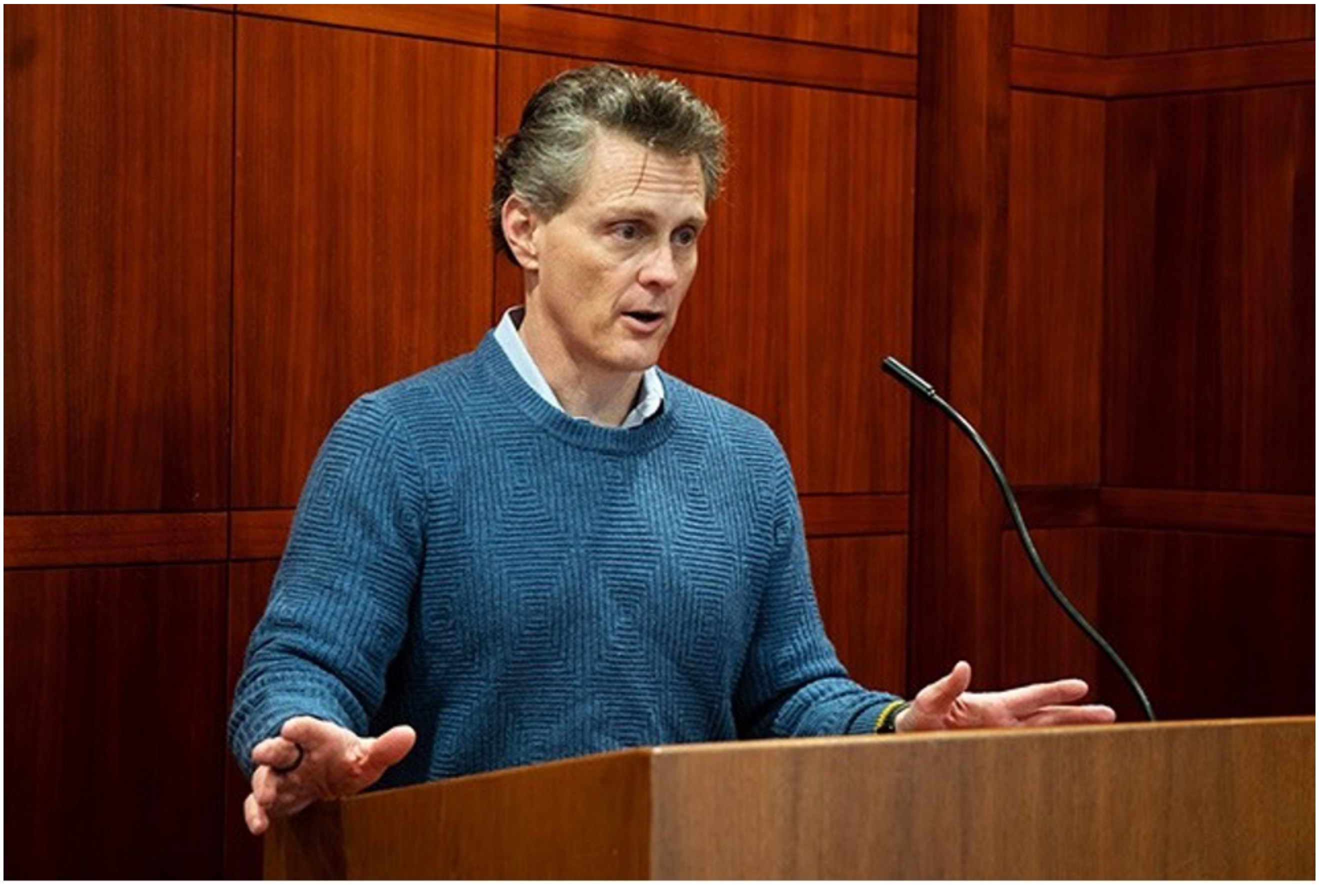

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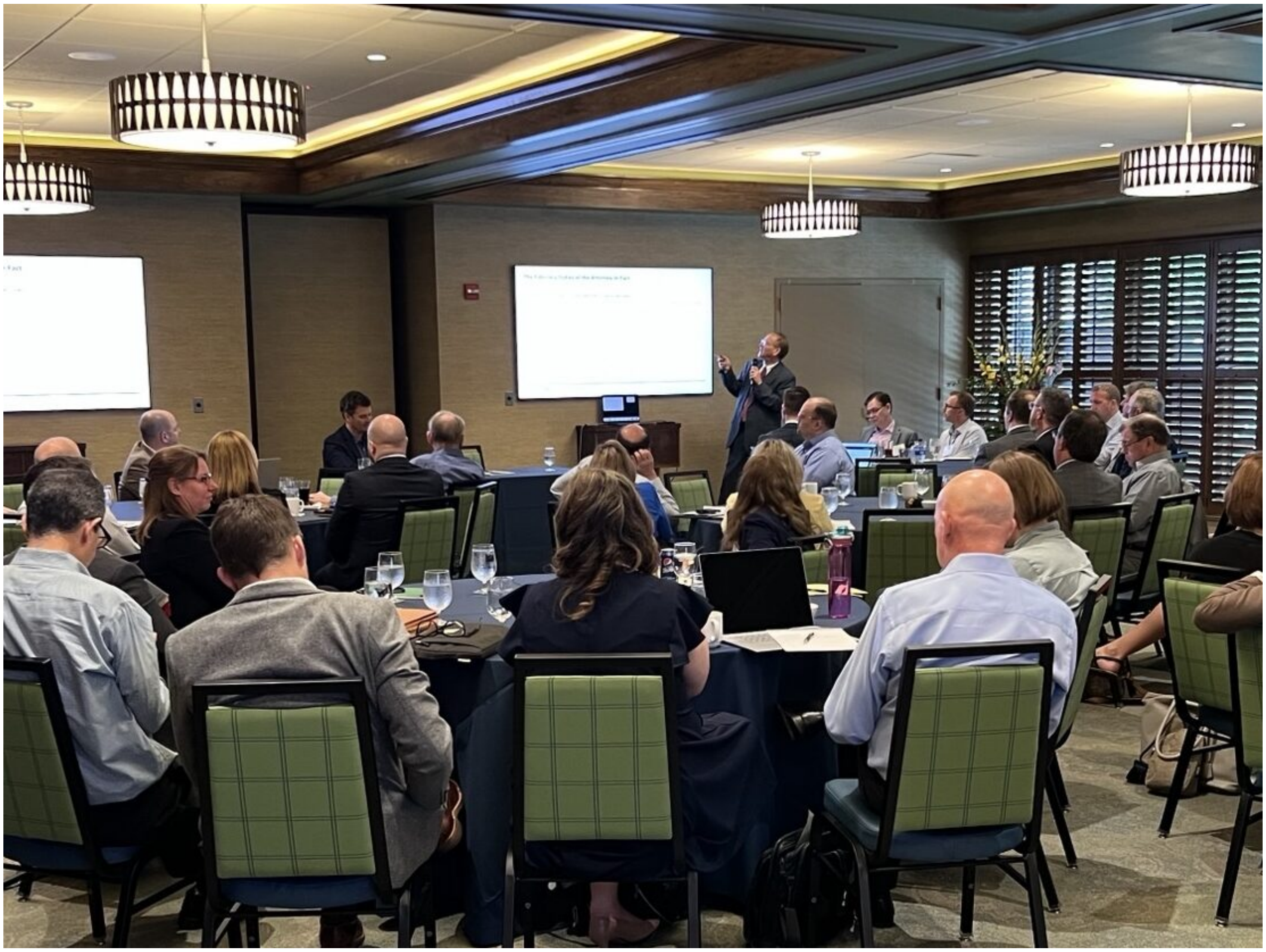

St. Louis Trust & Family Office is an independent, multi-family office and trust company that advises clients on more than $10 billion of investment assets and more than $12 billion of total wealth. Founded in 2002, St. Louis Trust & Family Office provides holistic, high-touch client service including customized, independent investment management and a full range of family office and fiduciary services. The firm serves a limited number of clients with substantial wealth in order to maintain very low client-to-employee ratios. Visit stlouistrust.com to explore how the firm manages complexity with unmatched expertise and focuses on Family, Always.