

Announcement: Tax Services at Evergreen

Dear Clients and Friends,

Evergreen Gavekal is pleased to announce the acquisition of the Mercer Island-based tax accounting firm, Sterling, Kuder & Co. P.S. Their firm has provided customized tax and financial consulting services to both individuals and companies for over 35 years.

At times, Evergreen clients have conveyed to us the frustrations and headaches due to the lack of integration between their CPA and investment advisor. Our goal is simple: We want to simplify our clients' financial lives by offering a wholistic platform of financial services provided by skilled professionals. While the work that goes on behind the scenes to deliver on this goal is complex, it doesn't need to be for our clients.

We have always felt that to be a leading firm in our industry we would have to evolve and adapt. This acquisition helps to distinguish us from our competitors and, ultimately, to better serve our clients. While we understand that not all clients will choose to utilize Evergreen's tax services, this decision was driven by results from a survey last year where 85% of clients said that they would value having access to a CPA at Evergreen. For clients who are interested in a combined service offering, we believe the value of bringing both capabilities under-one-roof will become evident.

Striving to offer elite financial advice to clients across the broad spectrum of their financial lives will remain in our DNA. We look forward to working alongside our new colleagues at Evergreen Sterling Kuder and providing a greater breadth of capabilities to service our clients.

Sincerely,

Tyler Hay
CEO

If you are interested in Evergreen's tax services, please visit evergreengavekal.com/tax.