

Part 2B of Form ADV: Brochure Supplement

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Part 2B of Form ADV: Brochure Supplement



Wilmington Trust Investment Advisors, Inc.
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

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 the above-named professional that supplements Wilmington Trust Investment Advisors, Inc. (“WTIA”) Form ADV Part 2A brochure. If you did not receive a copy of the WTIA Form ADV Part 2A brochure, or if you have any questions about the contents of this supplement, please contact WTIA’s Chief Compliance Officer, Andrew Baldauf, at 732-476-6003 or via email at abaldauf@mtb.com.

Additional information about the above-named professional and about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Anthony M. “Tony” Roth

Senior Executive Vice President - Chief Investment Officer

Item 2- Educational Background and Business Experience

Year of Birth: 1967

Education: J.D., Harvard Law School,
Masters, French and International Tax Law, 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

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client’s evaluation of this individual. There is no such information to be reported respecting Mr. Roth.

Item 4- Other Business Activities

Mr. Roth is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

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

Item 6- Supervision

Lisa Roberts is responsible for the supervision and oversight of Mr. Roth. Ms. Roberts is a Senior Executive Vice President and the Head of 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 (212)965-5918.

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Wilmington Trust Investment Advisors, Inc.
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

Walter J. Dillingham Jr.

277 Park Avenue, 26th
New York, NY 10172
1-800-878-0668

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Walter J. Dillingham Jr., CFA®

Senior Vice President – Director of Endowments and Foundations National Practice

Item 2- Educational Background and Business Experience

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.
Director of Endowments and Foundations National Practice
2000 – 2010, Bank of America
Business Development Officer

Professional Designations: CFA (Chartered Financial Analyst)⁽¹⁾

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client’s evaluation of this individual. There is no such information to be reported respecting Mr. Dillingham.

Item 4- Other Business Activities

Mr. Dillingham is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Dillingham receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Stephen Seivold , Senior 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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Wilmington Trust Investment Advisors, Inc.
Wilmington Trust Center
1100 North Market Street
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March 27, 2026

Matthew D. Glaser

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

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Matthew D. Glaser

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

Item 2- Educational Background and Business Experience

Year of Birth: 1965

Education: B.A. History, Wesleyan University
MBA 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

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Mr. Glaser.

Item 4- Other Business Activities

Mr. Glaser is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Glaser receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Anthony "Tony" Roth, Senior Executive Vice President and Chief Investment Officer of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Glaser.

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Wilmington Trust Investment Advisors, Inc.
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March 27, 2026

Andrew H. Hopkins

Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19801
1-800-878-0668

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Additional information about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Andrew H. Hopkins, CFA®

Senior Vice President and Head of Equity Research

Item 2- Educational Background and Business Experience

Year of Birth: 1964

Education: B.S. Finance, Goldey Beacom College
MBA Wilmington University

Business Background: 2008 - Present, Wilmington Trust Investment Advisors, Inc.
Senior Vice President and Head of Equity Research

Professional Designations: CFA (Chartered Financial Analyst)⁽¹⁾

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Mr. Hopkins.

Item 4- Other Business Activities

Mr. Hopkins is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Hopkins receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Matthew Glaser, Head of Equity & Non-Traditional Investments 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.

- (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 Investment Advisors, Inc.
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1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

William Bennett

Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19801
1-800-878-0668

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Additional information about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

William Bennett, CFA®

Senior Vice President and Senior Wealth Investment Advisor

Item 2- Educational Background and Business Experience

Year of Birth: 1994

Education: B.S. Finance, Pennsylvania State University
MBA Villanova University

Business Background: 2016 - Present, Wilmington Trust Investment Advisors, Inc.

Professional Designations: CFA (Chartered Financial Analyst)⁽¹⁾

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Mr. Bennett.

Item 4- Other Business Activities

Mr. Bennett is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Bennett receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Matthew Glaser, Head of Equity & Non-Traditional Investments of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Bennett 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 Investment Advisors, Inc.
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646-531-7248

March 27, 2026

Kyle Larson

One Fountain Plaza
Buffalo, New York
1-800-878-0668

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Additional information about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Kyle Larson, CFA®

Senior Vice President – Wealth Advisor Manager

Item 2- Educational Background and Business Experience

Year of Birth: 1986

Education: BA in Business Management – Arizona State University
MBA – University of North Dakota

Business Background: 2021 - Present, Wilmington Trust Investment Advisors
2019-2021, Charles Schwab, Financial Consultant
2018-2019, JP Morgan, Portfolio Manager
2009-2018, Wells Fargo, Premier Banker

Professional Designations: CFA (Chartered Financial Analyst)⁽¹⁾

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Mr. Larson.

Item 4- Other Business Activities

Mr. Larson is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Larson receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Stephen Seivold, Senior Vice President and Senior Institutional Portfolio Manager of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Larson 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
646-531-7248

March 27, 2026

John Lawson

277 Park Avenue, 26th Floor
New York, NY 10172
1-800-878-0668

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Additional information about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

John Lawson

Senior Vice President - Senior Investment Advisor-Team Leader

Item 2- Educational Background and Business Experience

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

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Mr. Lawson.

Item 4- Other Business Activities

Mr. Lawson is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Lawson receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Stephen Seivold, Senior Vice President and Senior 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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Wilmington Trust Investment Advisors, Inc.
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March 27, 2026

John J. Malloy, Jr.

Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
1-800-878-0668

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Additional information about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

John J. Malloy, Jr.

Senior Vice President, Senior Fixed Income Municipal Portfolio Manager

Item 2- Educational Background and Business Experience

Year of Birth: 1975

Education: B.A. Health Administration, Arcadia University
MBA Finance, Saint Joseph's University

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

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Mr. Malloy.

Item 4- Other Business Activities

Mr. Malloy is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Malloy receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

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. Malloy 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
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March 27, 2026

Eugene J Paloni, Jr.

Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
1-800-878-0668

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Additional information about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Eugene J Paloni, Jr.

Senior Vice President – Fixed Income Portfolio Manager

Item 2- Educational Background and Business Experience

Year of Birth: 1965

Education: B.S. Accounting, Widener University

Business Background: 2009 - Present, Wilmington Trust Investment Advisors, Inc.
Senior Vice President and Senior Portfolio Manager

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Mr. Paloni.

Item 4- Other Business Activities

Mr. Paloni is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Paloni receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Wilmer Stith, Senior Vice President and Senior Fixed Income Portfolio Manager/Team Leader 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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Wilmington Trust Investment Advisors
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

Robert Papelian

One Fountain Plaza
575 Main Street
Buffalo, NY 14203
1-800-878-0668

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Additional information about the above-named professional and about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Robert Papelian, CFA®

Senior Vice President – Senior Wealth Investment Advisor

Item 2- Educational Background and Business Experience

Year of Birth: 1988

Education: M.S. Investment Management & Financial Analysis, Creighton University
B.S. Business Administration, John Carroll University

Business Background: 2025- Present, Wilmington Trust, Sr. Wealth Investment Advisor
2024-2025, Manning & Napier Advisors, Senior Financial Consultant
2021-2024, REDW Wealth, Sr. Wealth Advisor and CIO
2019-2021, Phoenician Wealth Management, Managing Member
2018-2019, Chares Schwab, Portfolio Consultant
2017-2018, Charles Schwab, Sr. Specialist, Assoc. Portfolio Consultant
2014-2017, Charles Schwab, Global Trading Specialist

Professional Designations: CFA (Chartered Financial Analyst)⁽¹⁾

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Mr. Papelian.

Item 4- Other Business Activities

Mr. Papelian is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Papelian receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Matthew Glaser, Head of Equity & Non-Traditional Investments of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Papelian 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 Investment Advisors
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

Tom Pierce

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

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Additional information about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Tom Pierce, CFA®

Senior Vice President - Fixed Income Search & Strategist

Item 2- Educational Background and Business Experience

Year of Birth: 1960

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

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

Professional Designations: CFA (Chartered Financial Analyst)⁽¹⁾

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Mr. Pierce.

Item 4- Other Business Activities

Mr. Pierce is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Pierce receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Mathew Glaser, Head of Equity & Non-Traditional Investments 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.

- (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
Wilmington, DE 19890
646-531-7248

March 27, 2026

Louis Porta

45 Eisenhower Drive, 4th fl.,
Paramus, NJ 07652
1-800-878-0668

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Additional information about the above-named professional and about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Louis Porta, CFA®

Managing Director, Senior Investment Advisor

Item 2- Educational Background and Business Experience

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)⁽¹⁾

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Mr. Porta.

Item 4- Other Business Activities

Mr. Porta is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Porta receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Christopher Sporcic, Senior Vice President of Wilmington Trust Investment Advisors Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Porta 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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March 27, 2026

Zia E Qasim

Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
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Additional information about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

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. Economics, University of Delaware
M.S. International Business, University of Delaware
MBA University of Delaware

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

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client’s evaluation of this individual. There is no such information to be reported respecting Mr. Qasim.

Item 4- Other Business Activities

Mr. Qasim is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Qasim receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

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. Qasim 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
646-531-7248

March 27, 2026

Susan L. Schnaars

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

This Form ADV Part 2B Brochure Supplement provides information about the above-named professional that supplements Wilmington Trust Investment Advisors, Inc. (“WTIA”) Form ADV Part 2A brochure. If you did not receive a copy of the WTIA Form ADV Part 2A brochure, or if you have any questions about the contents of this supplement, please contact WTIA’s Chief Compliance Officer, Andrew Baldauf, at 732-476-6003 or via email at abaldauf@mtb.com.

Additional information about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Susan L. Schnaars, CFA®

Senior Vice President – Senior Wealth Investment Advisor

Item 2- Educational Background and Business Experience

Year of Birth: 1962

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

Business Background: 2012 – Present, Wilmington Trust,
Senior Vice President Wealth Advisory Services
1995 - 2012, Wilmington Trust
Senior Portfolio Manager

Professional Designations: CFA (Chartered Financial Analyst)⁽¹⁾

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Ms. Schnaars.

Item 4- Other Business Activities

Ms. Schnaars is not actively engaged in any other investment-related business or occupation aside from her responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Ms. Schnaars receives investment-related compensation solely from her responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Stephen Seivold, Senior Vice President and Senior 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.

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Wilmington Trust Investment Advisors, Inc.
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

Stephen Seivold

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

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Additional information about the above-named professional and about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Stephen Seivold

Senior Vice President -Senior Institutional Portfolio Manager

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

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Mr. Seivold.

Item 4- Other Business Activities

Mr. Seivold is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Seivold receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Christopher Sporcic, Senior 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.



Wilmington Trust Investment Advisors, Inc.
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

Eric Smookler

Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19801
1-800-878-0668

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Additional information about the above-named professional and about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

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

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Mr. Smookler.

Item 4- Other Business Activities

Mr. Smookler is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Smookler receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

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.



Wilmington Trust Investment Advisors, Inc.
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

Christopher A. Sporcic

213 Market Street
Harrisburg, PA 17101
1-800-878-0668

This Form ADV Part 2B Brochure Supplement provides information about the above-named professional that supplements Wilmington Trust Investment Advisors, Inc. (“WTIA”) Form ADV Part 2A brochure. If you did not receive a copy of the WTIA Form ADV Part 2A brochure, or if you have any questions about the contents of this supplement, please contact WTIA’s Chief Compliance Officer, Andrew Baldauf, at 732-476-6003 or via email at abaldauf@mtb.com.

Additional information about the above-named professional and about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Christopher A. Sporcic

Senior Vice President - Senior Institutional Portfolio Manager/Team Leader

Item 2- Educational Background and Business Experience

Year of Birth: 1978

Education: MBA, Duke University
B.S. Physics, Bates College

Business Background: 2010- Present, Wilmington Trust Investment Advisors, Inc.,
Senior Vice President
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

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Mr. Sporcic.

Item 4- Other Business Activities

Mr. Sporcic is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

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

Item 6 - Supervision

Matthew Glaser, Executive Vice President and 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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Wilmington Trust Investment Advisors, Inc.

Wilmington Trust Center

1100 North Market Street

Wilmington, DE 19890

646-531-7248

March 27, 2026

Choopong Sripraipan

250 South Clinton Street

Syracuse, NY 13202

1-800-878-0668

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Additional information about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Choopong Sripraipan, CFA®

Vice, President, Wealth Senior Client Portfolio Manager

Item 2- Educational Background and Business Experience

Year of Birth:	1979
Education:	MBA, State University of New York at Oswego M.S., Logistics, University of Texas at Arlington B.E., Civil Engineering, Chulalongkorn University, Thailand
Business Background:	2022-Present, Client Portfolio Manager, Wilmington Trust Investment Advisors 2018-2022, Financial Analyst/Senior Data Analyst, Syracuse Community Health 2018-2018-Project Financial Analyst, BHG Financial 2017-2018, Financial Analyst, KPH Healthcare Services 2016-2017, Finance Adjunct, State University of New York at Oswego
Professional Designations:	CFA (Chartered Financial Analyst) ⁽¹⁾

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Mr. Sripraipan.

Item 4- Other Business Activities

Mr. Sripraipan is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Sripraipan receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Christopher 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. Sripraipan 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 Investment Advisors, Inc.
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

Nicolas Stefano

250 S. Clinton St., 4th Floor
Syracuse, NY 13202
1-800-878-0668

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Additional information about the above-named professional and about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Nicolas Stefano

Senior Vice President - Senior Investment Advisor

Item 2- Educational Background and Business Experience

Year of Birth: 1979

Education: M.I.A, International Finance & Economic Policy, Columbia University
B.S. Applied Economics and Management, Cornell University

Business Background: 2025- Present, Wilmington Trust Investment Advisors, Inc.,
SVP, Senior Investment Advisor
2024-2025, NBT Bank, Investment Officer Manager
2023-2024, State Street Global Advisors, Fixed Income Stewardship
Lead
2021-2023, DNB ASA, Senior Corporate Analyst
2011-2021, Norges Bank, Senior Advisor

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Mr. Stefano.

Item 4- Other Business Activities

Mr. Stefano is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Stefano receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

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. Stefano 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
646-531-7248

March 27, 2026

Mark Stevenson

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

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Additional information about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

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: 2011- Present, Wilmington Trust Investment Advisors, Inc.
Senior Portfolio Manager

Professional Designations: CFA (Chartered Financial Analyst)⁽¹⁾

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Mr. Stevenson.

Item 4- Other Business Activities

Mr. Stevenson is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Stevenson receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Stephen Seivold, Senior 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.



Wilmington Trust Investment Advisors, Inc.
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

Wilmer C. Stith, III

Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19801
1-800-878-0668

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Additional information about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Wilmer C. Stith, III, CFA®

Senior Vice President - Senior Fixed Income Portfolio Manager and Team Leader

Item 2- Educational Background and Business Experience

Year of Birth: 1966

Education: MBA, 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)⁽¹⁾

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Mr. Stith, III.

Item 4- Other Business Activities

Mr. Stith, III is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Stith, III receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

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. 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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Wilmington Trust Investment Advisors, Inc.
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

Jordan Strauss

Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19801
1-800-878-0668

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Additional information about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Jordan Strauss, CFA®

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)⁽¹⁾

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Mr. Strauss.

Item 4- Other Business Activities

Mr. Strauss is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Strauss receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Matthew Glaser, Head of Equity & Non-Traditional Investments 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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Wilmington Trust Investment Advisors, Inc.
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

Eric Triplett

180 South Clinton Ave
Rochester, NY 14604
1-800-878-0668

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Additional information about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Eric Triplett, CFA®

Senior Vice President - Senior Wealth Investment Advisor

Item 2- Educational Background and Business Experience

Year of Birth: 1982

Education: B.S., University of Scranton
MBA, Columbia Business School

Business Background: 2025- Present, Wilmington Trust, Sr. Wealth Investment Advisor
2015-2025, Federated Hermes, Portfolio Manager

Professional Designations: CFA (Chartered Financial Analyst)⁽¹⁾

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Mr. Triplett.

Item 4- Other Business Activities

Mr. Triplett is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Triplett receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

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. Triplett 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 Investment Advisors, Inc.
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

Wendy M. White

Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
1-800-878-0668

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Additional information about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Wendy M. White

Senior Vice President – Senior Fixed Income Portfolio Manager

Item 2- Educational Background and Business Experience

Year of Birth: 1967

Education: B.S. Business Administration, University of Delaware
MBA University of Delaware

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

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Ms. White.

Item 4- Other Business Activities

Ms. White is not actively engaged in any other investment-related business or occupation aside from her responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Ms. White receives investment-related compensation solely from her responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

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 Ms. White 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 Investment Advisors, Inc.
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

David Edward Wolf

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

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Additional information about WTIA is available on the SEC’s website at 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
MBA University of Baltimore

Business Background: 2009 - Present, Wilmington Trust
Senior Investment Officer

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Mr. Wolf.

Item 4- Other Business Activities

Mr. Wolf is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Wolf receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Stephen Seivold, Senior 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.

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
646-531-7248

March 27, 2026

Suzanne Wyant

Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19801
1-800-878-0668

This Form ADV Part 2B Brochure Supplement provides information about the above-named professional that supplements Wilmington Trust Investment Advisors, Inc. (“WTIA”) Form ADV Part 2A brochure. If you did not receive a copy of the WTIA Form ADV Part 2A brochure, or if you have any questions about the contents of this supplement, please contact WTIA’s Chief Compliance Officer, Andrew Baldauf, at 732-476-6003 or via email at abaldauf@mtb.com.

Additional information about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Suzanne Wyant

Senior Vice President – Senior Fixed Income Portfolio Manager

Item 2- Educational Background and Business Experience

Year of Birth: 1961

Education: B.S. Finance, West Chester University
MBA Widner University

Business Background: 2000- Present, Wilmington Trust Investment Advisors, Inc.
Senior Vice President, Senior Fixed Income Portfolio Manager

Item 3- Disciplinary Information

This item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client’s evaluation of this individual. There is no such information to be reported respecting Ms. Wyant.

Item 4- Other Business Activities

Ms. Wyant is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Ms. Wyant receives investment-related compensation solely from her responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Wilmer Stith, Senior Vice President and Senior Fixed Income Portfolio Manager/Team Leader of Wilmington Trust Investment Advisors, Inc., (800-878-0668), is directly responsible for supervising the advisory activities of Ms. Wyant 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
646-531-7248

March 27, 2026

Jerry Weidner

350 Fore Street
Portland, ME 04101
1-800-878-0668

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Additional information about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Jerry Weidner, CFA®

Vice President – Wealth Investment Advisor

Item 2- Educational Background and Business Experience

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)⁽¹⁾

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client’s evaluation of this individual. There is no such information to be reported respecting Mr. Weidner.

Item 4- Other Business Activities

Mr. Weidner is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Weidner receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Christopher 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.

- (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 Investment Advisors, Inc.
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

Carly Nathanson

277 Park Avenue, 26th Floor
New York, New York
1-800-878-0668

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Additional information about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Carly Nathanson, CFA®

Senior Vice President – Senior Investment Advisor

Item 2- Educational Background and Business Experience

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)⁽¹⁾

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client’s evaluation of this individual. There is no such information to be reported respecting Ms. Nathanson.

Item 4- Other Business Activities

Ms. Nathanson is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Ms. Nathanson receives investment-related compensation solely from her responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Christopher 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.

- (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.



Wilmington Trust Investment Advisors, Inc.
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

Jason Hannon

Wilmington Trust Center
1100 North Market Street
Wilmington, DE 09890-001
1-800-878-0668

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Additional information about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Jason Hannon, CFA®

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

Item 2- Educational Background and Business Experience

Year of Birth: 1983

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

Business Background: 2019- Present Wilmington Trust Investment Advisors, Inc.
2014-2019 Emigrant Bank / New York Private Bank & Trust
2010-2014 Arbor Research & Trading
2005-2010 Vanguard

Professional Designations: CFA (Chartered Financial Analyst)⁽¹⁾

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Mr. Hannon.

Item 4- Other Business Activities

Mr. Hannon is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Hannon receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

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. Hannon 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 Investment Advisors, Inc.
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

John Bradarich

10250 Constellation Boulevard
Suite 2800
Los Angeles, CA 90067
1-800-878-0668

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Additional information about WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

John Bradarich

Senior Vice President – Senior Wealth Investment Advisor

Item 2- Educational Background and Business Experience

Year of Birth: 1985

Education: Bachelor of Business Administration, Focus on 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 Investment Counselor- HSBC Private Bank
2008-2018 - Investment Specialist – JP Morgan Private Bank

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. There is no such information to be reported respecting Mr. Bradarich.

Item 4- Other Business Activities

Mr. Bradarich is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Bradarich receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Christopher 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.

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Wilmington Trust Investment Advisors, Inc.
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

Kevin Zosulis

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

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Additional information WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Kevin Zosulis, CFA®

National Director – Investment Advisor Lead

Item 2- Educational Background and Business Experience

Year of Birth: 1970

Education: MBA – Rider University
Bachelor of Science – University of Delaware

Business Background: 2024-Present Wilmington Trust, Investment Advisor Lead
2015-2024, Wilmington Trust, Senior Investment Advisor
2006-2015, BNY Mellon Wealth Management, Sr. Director Portfolio Mgmt.

Professional Designations: CFA (Chartered Financial Analyst)¹

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client’s evaluation of this individual. Mr. Zosulis has no disciplinary disclosures to be reported.

Item 4- Other Business Activities

Mr. Zosulis is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Zosulis receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Tony Roth, Executive Vice President and Chief Investment Officer of Wilmington Trust Investment Management, LLC (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Zosulis 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 Investment Advisors, Inc.
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

Greg Woodard

180 South Clinton Avenue
Rochester, NY 14604
1-800-878-0668

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Additional information WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Greg Woodard

Senior Vice President – Senior Wealth Investment Advisor

Item 2- Educational Background and Business Experience

Year of Birth: 1970

Education: B.S. Accounting – Villanova University
MBA in Finance – University of Rochester, Simon School of Business

Business Background: 2024-Present Wilmington Trust, Senior Investment Advisor
2005-2024 Manning & Napier

- 2021-2024, Managing Director of Institutional and Taft-Hartley
- 2019-2021, Managing Director of Wealth Management
- 2005-2019, Managing Director Portfolio Strategies Group

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client’s evaluation of this individual. Mr. Woodard has no disciplinary disclosures to be reported.

Item 4- Other Business Activities

Mr. Woodard is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. Woodard receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Christopher 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. Woodard 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
646-531-7248

March 27, 2026

Elson DeVan

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

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Additional information WTIA is available on the SEC’s website at www.adviserinfo.sec.gov.

Elson DeVan

Senior Vice President – Senior Wealth Investment Advisor

Item 2- Educational Background and Business Experience

Year of Birth: 1975

Education: B.A. of Economics – Hampden-Sydney College
MBA – University of Phoenix

Business Background: 2020 – Present: Wilmington Trust N.A., Senior Private Client Wealth Advisor
2008 – 2019: Wilmington Trust N.A., Private Client Wealth Advisor

Item 3- Disciplinary Information

This Item requires, as applicable, disclosure of all material facts regarding any legal or disciplinary events material to a client's evaluation of this individual. Mr. DeVan has no disciplinary disclosures to be reported.

Item 4- Other Business Activities

Mr. DeVan is not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 5- Additional Compensation

Mr. DeVan receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Advisors, Inc., or its affiliates.

Item 6 - Supervision

Stephen Seivold, 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. DeVan as they relate to the management of WTIA client accounts.