



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

Additional information about WTIM 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, 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

Currently, Mr. Roth is not actively engaged in any investment-related or other business or occupations that must be disclosed pursuant to this Item.

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 advice to clients provided by Mr. Roth through reports, discussions and meetings relating to such activities. Ms. Roberts can be reached at (212) 965-5918.



Wilmington Trust Investment Management, LLC
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Matthew D. Glaser

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

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Matthew D. Glaser

Executive Vice President - Head of Equity and Nontraditional 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 Management, LLC, or its affiliates.

Item 5- Additional Compensation

Mr. Glaser receives compensation from Wilmington Trust in the form of his regular salary and other regular bonuses and does not otherwise receive economic benefits for providing advisory services on behalf of the firm.

Item 6 - Supervision

Anthony M. "Tony" Roth, Executive Vice President and Chief Investment Officer of Wilmington Trust Investment Management, LLC (800-878-0668), is directly responsible for supervision and oversight of Mr. Glaser. Mr. Roth oversees the investment advice provided to clients by Mr. Glaser through reports, discussions and meetings relating to such activities. Mr. Roth can be reached at 1-800-878-0668.



Wilmington Trust Investment Management, LLC
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March 27, 2026

Brian P. Barry

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

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Brian P. Barry

Managing Director and Senior Investment Advisor

Item 2- Educational Background and Business Experience

Year of Birth: 1980

Education: MBA –International Business and Finance, New York University
Bachelor’s Degree, History and Economics, College of the Holy Cross

Business Background: 2021-Present, Wilmington Trust, Wealth Advisory Services
Managing Director and Senior Investment Advisor
2013-2021, ARS Investment Partners, LLC, Director & 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. Barry.

Item 4- Other Business Activities

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

Item 5- Additional Compensation

Mr. Barry receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Management, LLC, or its affiliates.

Item 6 - Supervision

Christopher Sporcic, Senior Vice President of Wilmington Trust Investment Management, LLC (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Barry as they relate to the management of WTIM SMA client accounts.



Wilmington Trust Investment Management, LLC
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Kevin Bruggeman

One Light Street, 15th Floor
Baltimore, MD 21202
1-800-878-0668

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

Kevin Bruggeman, CFA®

Senior Vice President and Senior Investment Advisor

Item 2- Educational Background and Business Experience

Year of Birth: 1971

Education: Bachelor of Business Administration, Finance – Loyola University

Business Background: 2003-Present, Wilmington Trust, Senior Investment Advisor

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. Bruggeman.

Item 4- Other Business Activities

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

Item 5- Additional Compensation

Mr. Bruggeman receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Management, LLC, or its affiliates.

Item 6 - Supervision

Christopher Sporcic, Senior Vice President of Wilmington Trust Investment Management, LLC (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Bruggeman as they relate to the management of WTIM SMA 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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Kyle Larson

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

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

Kyle Larson, CFA®

Senior Vice President and Wealth Advisor Manager

Item 2- Educational Background and Business Experience

Year of Birth: 1986

Education: B.A. Business Management, Arizona State University
MBA University of North Dakota

Business Background:

2021 – Present, Wilmington Trust Investment Advisors, Inc
Senior Investment Advisor

2019 – 2021: Charles Schwab VP, Financial Consultant

2018 – 2019: JP Morgan, Portfolio Manager

2009-2018: Wells Fargo Bank, 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 Management, LLC, or its affiliates.

Item 5- Additional Compensation

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

Item 6 - Supervision

Christopher Sporcic, Senior Vice President of Wilmington Trust Investment Management, LLC (800-878-0668) is directly responsible for supervising the advisory activities of Mr. Larson as they relate to the management of WTIM SMA client accounts.

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Carly Nathanson

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

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

Carly Nathanson, CFA®

Senior Vice President and Senior Investment Advisor

Item 2- Educational Background and Business Experience

Year of Birth: 1987

Education: B.A. – Columbia University

Business Background: 2021-Present – Senior Investment Advisor, Wilmington Trust
2018-2021 – Banker, JPMorgan 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 her responsibilities at Wilmington Trust Investment Management, LLC, or its affiliates.

Item 5- Additional Compensation

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

Item 6 - Supervision

John Lawson, Team Lead and Senior Vice President of Wilmington Trust Investment Management, LLC (800-878-0668), is directly responsible for supervising the advisory activities of Ms. Nathanson as they relate to the management of WTIM SMA client accounts.

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Mark Stevenson

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

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

Mark Stevenson, CFA®

Senior Vice President and 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,
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 has no disciplinary disclosures to be reported.

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 Management, LLC, or its affiliates.

Item 5- Additional Compensation

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

Item 6 - Supervision

Christopher Sporcic, Senior Vice President of Wilmington Trust Investment Management, LLC (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Stevenson as they relate to the management of WTIM SMA 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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Luke Tilley

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

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Luke Tilley

Executive Vice President - Chief Economist

Item 2- Educational Background and Business Experience

Year of Birth: 1977

Education: Ph.D., Economics, Temple University
Master of Arts Degree, Economics, Temple University
Bachelor of Science Degree, Economics and History, James Madison University

Business Background: 2015- Present, Wilmington Trust, Chief Economist

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. Tilley.

Item 4- Other Business Activities

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

Item 5- Additional Compensation

Mr. Tilley receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Management, LLC, or its affiliates.

Item 6- Supervision

Anthony M. "Tony" Roth, Executive Vice President and Chief Investment Officer of Wilmington Trust Investment Management, LLC (800-878-0668), is directly responsible for supervision and oversight of Mr. Tilley. Mr. Roth oversees the investment analysis provided by Mr. Tilley through reports, discussions and meetings relating to investment strategies. Mr. Roth can be reached at 1-800-878-0668.



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Meghan Shue

Radnor Financial Center
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Suite E-300
Wayne, PA 19087
1-800-878-0668

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

Meghan Shue

Executive Vice President - Head of Investment Strategy

Item 2- Educational Background and Business Experience

Year of Birth: 1987

Educational : MBA, University of Miami, 2012
Bachelor of Science in Engineering, Research and Financial Engineering,
Princeton University, 2009

Business Background: 2020- Present, Wilmington Trust, Chief Investment Strategist
2017-2020 Wilmington Trust, Senior Investment Strategist, Associate VP
2016-2017, Bessemer Trust, Investment Strategist, VP
2013-2015, Bessemer Trust, Investment Strategies Associate, VP

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. Shue.

Item 4- Other Business Activities

Ms. Shue is compensated and is a periodic financial media contributor for CNBC.

Item 5- Additional Compensation

Ms. Shue receives compensation from her responsibilities at Wilmington Trust and from her role as a contributor at CNBC.

Item 6- Supervision

Anthony M. "Tony" Roth, Executive Vice President and Chief Investment Officer of Wilmington Trust Investment Management, LLC (800-878-0668), is directly responsible for supervision and oversight of Ms. Shue. Mr. Roth oversees the investment analysis provided by Ms. Shue through reports, discussions and meetings relating to investment strategies. Mr. Roth can be reached at 1-800-878-0668.



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March 27, 2026

John Lawson

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

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John Lawson

Senior Vice President - Senior Wealth 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 Management, LLC, or its affiliates.

Item 5- Additional Compensation

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

Item 6- Supervision

Christopher Sporcic, Senior Vice President of Wilmington Trust Investment Management, LLC (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Lawson as they relate to the management of WTIM SMA client accounts.



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1100 North Market Street
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March 27, 2026

Louis Porta

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

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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 Management, LLC, or its affiliates.

Item 5- Additional Compensation

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

Item 6- Supervision

Christopher Sporcic, Senior Vice President of Wilmington Trust Investment Management, LLC (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Porta as they relate to the management of WTIM SMA client accounts.

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Susan L. Schnaars

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

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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, Sr. Investment Advisor
1995-2012, Wilmington Trust, Sr. Portfolio Manager
1992-1995, First National Bank of Maryland, Sr. 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 not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Management, LLC, or its affiliates.

Item 5- Additional Compensation

Ms. Schnaars receives investment-related compensation solely from her responsibilities at Wilmington Trust and from no other source.

Item 6- Supervision

Christopher Sporcic, Senior Vice President Managing Director and Vice President of Wilmington Trust Investment Management, LLC (800-878-0668), is directly responsible for supervising the advisory activities of Ms. Schnaars as they relate to the management of WTIM SMA 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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Greg Woodard

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

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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. There is no such information to be reported respecting Mr. Woodard.

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 Management, LLC, or its affiliates.

Item 5- Additional Compensation

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

Item 6- Supervision

Christopher Sporcic, Senior Vice President of Wilmington Trust Investment Management, LLC (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Woodard as they relate to the management of WTIM SMA client accounts.



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Kevin Zosulis

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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. There is no such information to be reported respecting Mr. Zosulis.

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 Management, LLC, or its affiliates.

Item 5- Additional Compensation

Mr. Zosulis receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Management, LLC, 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 WTIM 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 Management, LLC
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 the Wilmington Trust Investment Management, LLC (“WTIM”) Form ADV Part 2A Brochure. If you did not receive a copy of the WTIM Form ADV Part 2A brochure, or if you have any questions about the contents of this supplement, please contact WTIM’s Chief Compliance Officer, Andrew Baldauf, at 732-476-6003 or via email at abaldauf@mtb.com.

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

Christopher A. Sporcic

Senior Vice President – Senior Institutional Portfolio Manager and Team Leader

Item 2- Educational Background and Business Experience

Year of Birth: 1978

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

Business Background: 2020-Present: Senior Vice President Wilmington Trust, Senior Institutional Portfolio Manager
2010- 2020, Wilmington Trust Investment Vice President & Managing Director
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 Management, LLC, or its affiliates.

Item 5- Additional Compensation

Mr. Sporcic receives compensation solely from his responsibilities at Wilmington Trust Investment Management, LLC and its affiliates.

Item 6 - Supervision

Matthew Glaser, Member of WTIM Investment Strategy Team and Head of Equity and Nontraditional Investments and Manager Research for an advisory affiliate, Wilmington Trust Investment Advisors, Inc. (WTIA), (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Sporcic as they relate to the management of WTIM SMA client accounts.

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Wilmington Trust Investment Management, LLC
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

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

Additional information about WTIM 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
MS, Logistics, University of Texas at Arlington
Bachelor's degree in engineering, Civil Engineering, Chulalongkorn University, Thailand

Business Background: 2022-Present, Client Portfolio Manager, Wilmington Trust Investment Advisors (affiliate of WTIM)
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 Management, LLC, or its affiliates.

Item 5- Additional Compensation

Mr. Sripraipan receives compensation solely from his responsibilities at Wilmington Trust Investment Advisors (affiliate of WTIM) and from no other source.

Item 6 - Supervision

Christopher Sporcic, Senior Vice President of Wilmington Trust Investment Management, LLC (800-878-0668), is directly responsible for supervising the advisory activities Mr. Sripraipan as they relate to the management of WTIM 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 Management, LLC
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

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

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

Additional information about WTIM 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:	MBA, Columbia Business School B.S. Finance, University of Scranton
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 currently not actively engaged in any other investment-related business or occupation aside from his responsibilities at Wilmington Trust Investment Management, LLC, or its affiliates.

Item 5- Additional Compensation

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

Item 6- Supervision

Christopher Sporcic, Senior Vice President of Wilmington Trust Investment Management, LLC, is directly responsible for supervising the advisory activities of Mr. Triplett as they relate to the management of WTIM SMA 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 Management, LLC
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

Morgan Mohrman

115 Federal Street, 18th Floor
Boston, MA 02110
1-800-878-0668

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

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

Morgan Mohrman

Vice President - Senior Wealth Investment Advisor

Item 2- Educational Background and Business Experience

Year of Birth: 1959

Education: B.A., University of Massachusetts

Business Background: 2021 - Present: Vice President & Senior Investment Officer
Wilmington Trust
2014- 2020, Vice President & Senior Investment Advisor
TD Wealth Private Client Group
2012-2014, Vice President & Account Officer
Eastern Bank Wealth Management
2010-2012, Vice President & Financial Consultant
Rockland Trust Investment Management

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. Mohrman.

Item 4- Other Business Activities

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

Item 5- Additional Compensation

Mr. Mohrman receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Management, LLC, or its affiliates.

Item 6 - Supervision

John Frost, Senior Vice President and Senior Wealth Investment Advisor/Team Leader of Wilmington Trust Investment Management, LLC (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Mohrman as they relate to the management of WTIM SMA client accounts.



Wilmington Trust Investment Management, LLC
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

Christy Watkins
1100 North Market St,
Wilmington, DE 19890
1-800-878-0668

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

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

Christy Watkins, CFA®

Senior Vice President, Wealth Market Manager-Family Wealth

Item 2- Educational Background and Business Experience

Year of Birth: 1980

Education: B.S. Finance, University of Delaware

Business Background: 2022-Present, Wilmington Trust, Wealth Market Manager-Family Wealth
2018-2022, Wilmington Trust, Sr. Investment Advisor & Team Lead
2016-2018, Wilmington Trust, Senior Investment Advisor

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. Watkins.

Item 4- Other Business Activities

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

Item 5- Additional Compensation

Ms. Watkins receives investment-related compensation solely from her responsibilities at Wilmington Trust Investment Management, LLC, or its affiliates.

Item 6- Supervision

Christopher Sporcic, Senior Vice President of Wilmington Trust Investment Management, LLC (800-878-0668), is directly responsible for supervising the advisory activities of Ms. Watkins as they relate to the management of WTIM SMA 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 Management, LLC
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

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

Additional information about WTIM 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 Management, LLC, or its affiliates.

Item 5- Additional Compensation

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

Item 6 - Supervision

Christopher Sporcic, Senior Vice President of Wilmington Trust Investment Management, LLC (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Weidner as they relate to the management of WTIM SMA client accounts.

(2) 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 Management, LLC
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

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

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

David Edward Wolf

Vice President - Senior Wealth Investment Advisor

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 Wealth 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 Management, LLC, or its affiliates.

Item 5- Additional Compensation

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

Item 6 - Supervision

Christopher Sporcic, Senior Vice President of Wilmington Trust Investment Management, LLC (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Wolf as they relate to the management of WTIM SMA client accounts.



Wilmington Trust Investment Management, LLC
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

John Frost

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

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

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

John Frost, CFA®

Senior Vice President, Senior Investment Advisor/Team Leader

Item 2- Educational Background and Business Experience

Year of Birth:	1964
Education:	B.A., Gettysburg College MBA, Temple University
Business Background:	2022-present-Wilmington Trust, Senior Wealth Investment Advisor 2002-2022- Peoples United Advisors, Senior Relationship Advisor
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. Frost.

Item 4- Other Business Activities

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

Item 5- Additional Compensation

Mr. Frost receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Management, LLC, or its affiliates.

Item 6 - Supervision

Christopher Sporcic, Senior Vice President of Wilmington Trust Investment Management, LLC (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Frost as they relate to the management of WTIM SMA 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 Management, LLC
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

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

Additional information about WTIM 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, Charles 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 Management, LLC, or its affiliates.

Item 5- Additional Compensation

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

Item 6 - Supervision

Christopher Sporcic, Senior Vice President of Wilmington Trust Investment Management, LLC (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Papelian as they relate to the management of WTIM SMA 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 Management, LLC
Wilmington Trust Center
1100 North Market Street
Wilmington, DE 19890
646-531-7248

March 27, 2026

Edward Jones, III

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

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

Edward Jones, III

Senior Vice President, Senior Wealth Investment Advisor and Team Leader

Item 2- Educational Background and Business Experience

Year of Birth: 1968

Education: B.A., Classical Studies, University of Pennsylvania
J.D. Widner University School of Law

Business Background: 2004-Present, Wilmington Trust, Investment 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. Jones.

Item 4- Other Business Activities

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

Item 5- Additional Compensation

Mr. Jones receives investment-related compensation solely from his responsibilities at Wilmington Trust Investment Management, LLC, or its affiliates

Item 6 - Supervision

Christopher Sporcic, Senior Vice President of Wilmington Trust Investment Management, LLC (800-878-0668), is directly responsible for supervising the advisory activities of Mr. Jones as they relate to the management of WTIM SMA client accounts