



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

March 27, 2026

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**Anthony M. “Tony” Roth**

Radnor Financial Center  
150 N. Radnor Chester Road  
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](http://www.adviserinfo.sec.gov).

# Anthony M. “Tony” Roth

Senior Executive Vice President - Chief Investment Officer

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## 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

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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

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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

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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.



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**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 Nontraditional Investments

### Item 2- Educational Background and Business Experience

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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

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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

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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

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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

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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.



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**Brian P. Barry**

277 Park Avenue, 26<sup>th</sup> 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**

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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**

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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**

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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**

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

### **Item 6 - Supervision**

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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.



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**Kevin Bruggeman**

One Light Street, 15<sup>th</sup> Floor  
Baltimore, MD 21202  
1-800-878-0668

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## **Kevin Bruggeman, CFA®**

Senior Vice President and Senior Investment Advisor

### **Item 2- Educational Background and Business Experience**

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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)<sup>(1)</sup>

### **Item 3- Disciplinary Information**

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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**

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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**

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

### **Item 6 - Supervision**

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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.

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**Kyle Larson**

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

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## Kyle Larson, CFA®

Senior Vice President and Wealth Advisor Manager

### Item 2- Educational Background and Business Experience

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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)<sup>(1)</sup>

### Item 3- Disciplinary Information

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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

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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

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

### Item 6 - Supervision

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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, 26<sup>th</sup> Floor  
New York, New York  
1-800-878-0668

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## Carly Nathanson, CFA®

Senior Vice President and Senior Investment Advisor

### Item 2- Educational Background and Business Experience

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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)<sup>(1)</sup>

### Item 3- Disciplinary Information

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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

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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

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

### Item 6 - Supervision

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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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## Mark Stevenson, CFA®

Senior Vice President and Wealth Investment Advisor

### Item 2- Educational Background and Business Experience

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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)<sup>(1)</sup>

### Item 3- Disciplinary Information

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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

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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

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

### Item 6 - Supervision

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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.

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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

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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

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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

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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

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

### Item 6- Supervision

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

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## Meghan Shue

Executive Vice President - Head of Investment Strategy

### Item 2- Educational Background and Business Experience

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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

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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

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

### Item 5- Additional Compensation

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

### Item 6- Supervision

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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

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**John Lawson**

277 Park Avenue  
26<sup>th</sup> 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

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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

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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

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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

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

## Item 6- Supervision

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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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## **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

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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)<sup>1</sup>

### Item 3- Disciplinary Information

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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

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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

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

### Item 6- Supervision

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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.

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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

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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

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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

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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

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

## Item 6- Supervision

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### **Kevin Zosulis**

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](mailto:abaldauf@mtb.com).

Additional information about WTIM is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Kevin Zosulis, CFA®

National Director – Investment Advisor Lead

### Item 2- Educational Background and Business Experience

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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)<sup>1</sup>

### Item 3- Disciplinary Information

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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

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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

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

### Item 6- Supervision

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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

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## **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](mailto:abaldauf@mtb.com).

Additional information about WTIM is available on the SEC’s website at [www.adviserinfo.sec.gov](http://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

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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

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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

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

## Item 6 - Supervision

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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.

**Part 2B of Form ADV: Brochure Supplement**

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Item 1- Cover Page

Part 2B of Form ADV: Brochure Supplement

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March 27, 2026

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**Choopong Sripraipan**

250 South Clinton Street  
Syracuse, NY 13202  
1-800-878-0668

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# Choopong Sripraipan, CFA®

Vice, President, Wealth Senior Client Portfolio Manager

## Item 2- Educational Background and Business Experience

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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)<sup>(1)</sup>

## Item 3- Disciplinary Information

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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

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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

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

## Item 6 - Supervision

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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.



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March 27, 2026

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

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Additional information about WTIM is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Eric Triplett, CFA®

Senior Vice President, Senior Wealth Investment Advisor

### Item 2- Educational Background and Business Experience

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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) <sup>(1)</sup>

### Item 3- Disciplinary Information

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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

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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

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

### Item 6- Supervision

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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.



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March 27, 2026

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## **Morgan Mohrman**

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

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Additional information about WTIM is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Morgan Mohrman

Vice President - Senior Wealth Investment Advisor

### Item 2- Educational Background and Business Experience

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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

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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

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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

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

### Item 6 - Supervision

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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.



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March 27, 2026

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

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Additional information about WTIM is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

# Christy Watkins, CFA®

Senior Vice President, Wealth Market Manager-Family Wealth

## Item 2- Educational Background and Business Experience

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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)<sup>(1)</sup>

## Item 3- Disciplinary Information

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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

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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

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

## Item 6- Supervision

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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.

**Part 2B of Form ADV: Brochure Supplement**

Item 1- Cover Page

Part 2B of Form ADV: Brochure Supplement

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Wilmington Trust Investment Management, LLC  
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March 27, 2026

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**Jerry Weidner**

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

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## Jerry Weidner, CFA®

Vice President – Wealth Investment Advisor

### Item 2- Educational Background and Business Experience

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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)<sup>(1)</sup>

### Item 3- Disciplinary Information

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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

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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

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

### Item 6 - Supervision

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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.

**Part 2B of Form ADV: Brochure Supplement**

Item 1- Cover Page

Part 2B of Form ADV: Brochure Supplement

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

March 27, 2026

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**David Edward Wolf**

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

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## David Edward Wolf

Vice President - Senior Wealth Investment Advisor

### Item 2- Educational Background and Business Experience

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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

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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

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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

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

### Item 6 - Supervision

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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

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**John Frost**

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

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Additional information about WTIM is available on the SEC’s website at [www.adviserinfo.sec.gov](http://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

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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

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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

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

### Item 6 - Supervision

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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.



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March 27, 2026

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## **Robert Papelian**

One Fountain Plaza  
575 Main Street  
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](http://www.adviserinfo.sec.gov).

## Robert Papelian, CFA®

Senior Vice President – Senior Wealth Investment Advisor

### Item 2- Educational Background and Business Experience

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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)<sup>(1)</sup>

### Item 3- Disciplinary Information

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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

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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

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

### Item 6 - Supervision

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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.

**Part 2B of Form ADV: Brochure Supplement**

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Item 1- Cover Page

Part 2B of Form ADV: Brochure Supplement

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Wilmington Trust Investment Management, LLC  
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March 27, 2026

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**Edward Jones, III**

Radnor Financial Center  
150 N. Radnor Chester Road  
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](http://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

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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

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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

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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