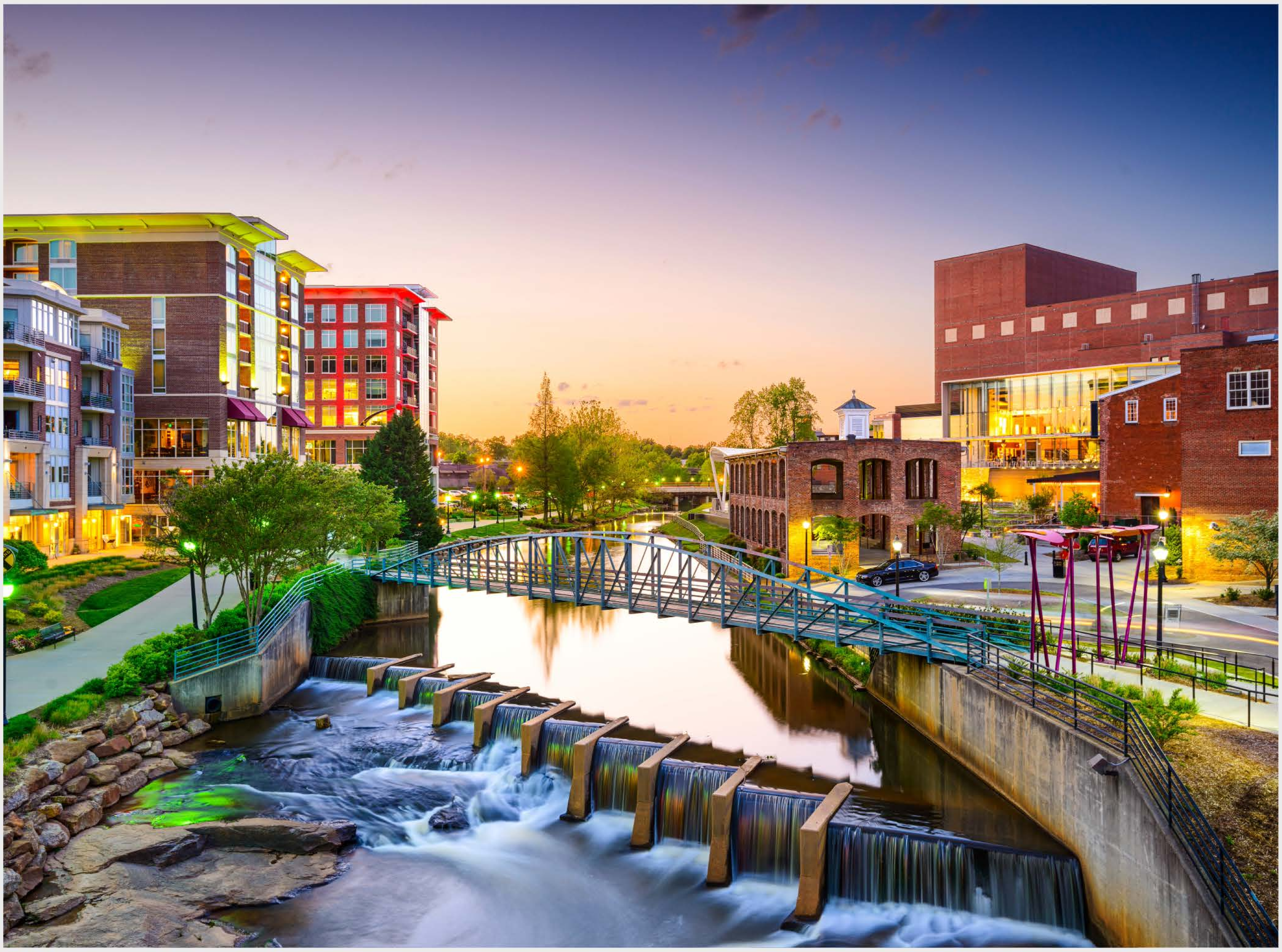
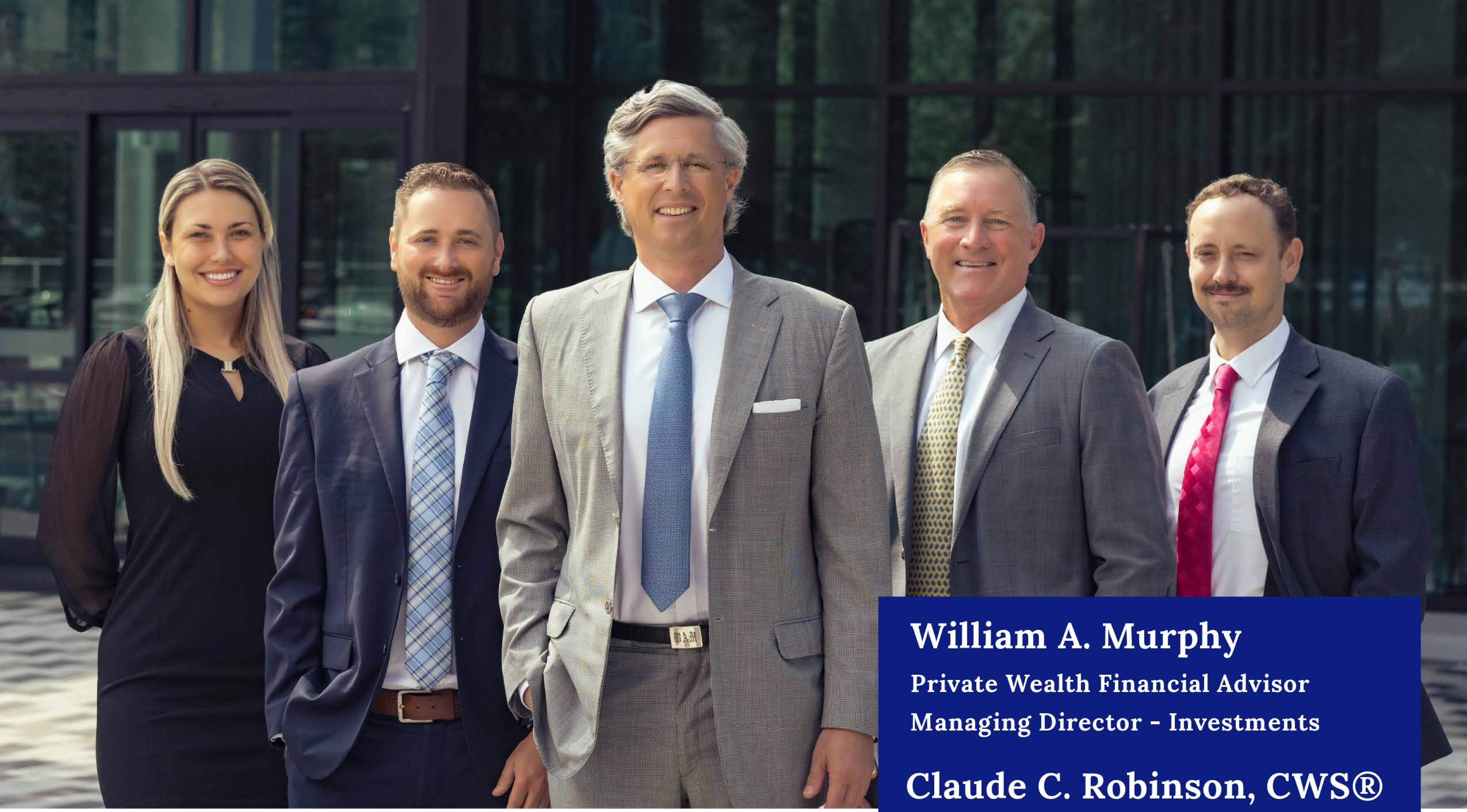
The Murphy Investment Group

of Wells Fargo Advisors



"Wealth strategies customized to sustain your lifestyle and legacy"

fa.wfa.com/themurphyinvestmentgroup



William A. Murphy
Private Wealth Financial Advisor
Managing Director - Investments

Claude C. Robinson, CWS®
Certified Wealth Strategist®
Senior Wealth Client Financial Advisor
Senior Vice President - Investments

Ryan B. Callaham
Financial Advisor

Daniel S. Willey
Senior Registered Client Associate

Piper S. Dabney
Senior Registered Client Associate

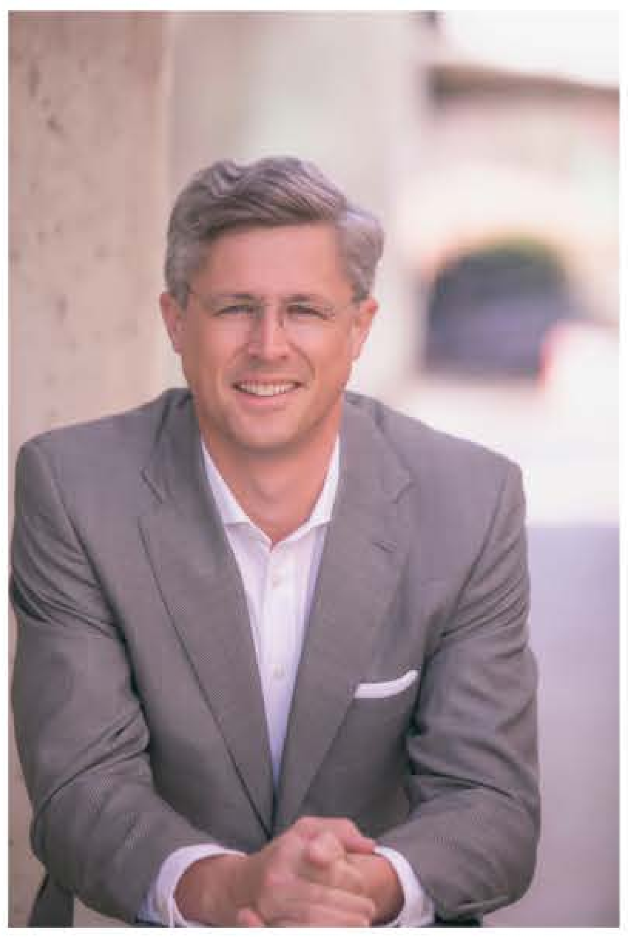
As a Private Wealth Financial Advisor, Will Murphy and team work with clients who have a wide variety of unique and complex wealth management needs. To adequately address the full spectrum of challenges faced by those with significant wealth, we coordinate with a team of specialized professionals and leverage the vast resources of Wells Fargo & Company.

We believe your investment strategy should support and sustain your long-term financial future. Drawing from a wide range of investment choices and research, we'll help you align your investment strategy to the things that are most important to you.

While our team provides a small-town, private boutique feel, we have the infrastructure in place through the Wealth and Investment Management to provide our clients with access to Wells Fargo Bank specialists who can provide guidance across many aspects of wealth planning, such as legacy planning, banking and lending needs, philanthropic strategies and family dynamics. We are committed to a holistic, personal approach in serving affluent individuals, families, foundations, and institutions.

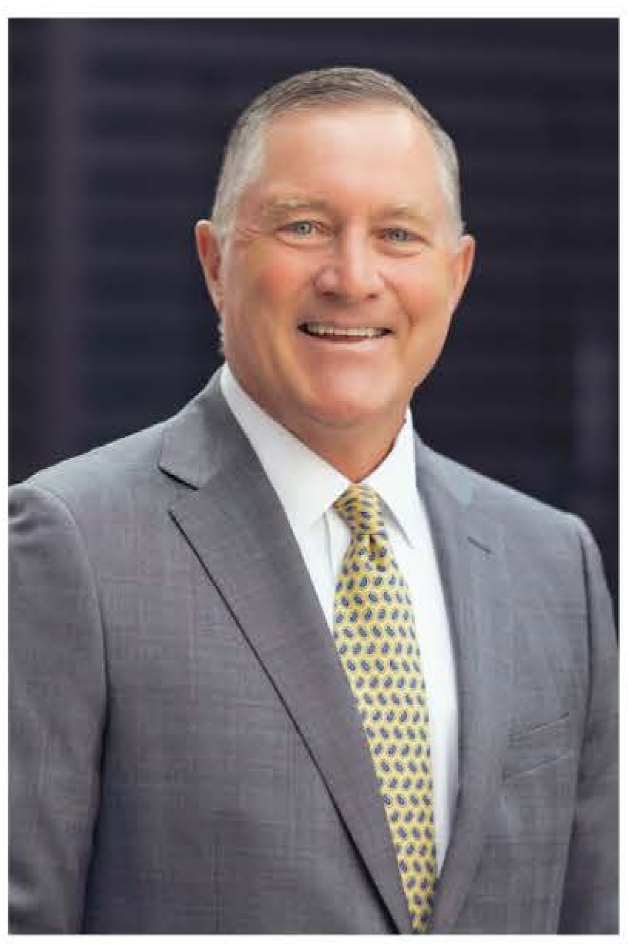
You deserve a personal, tailored plan. Lasting, meaningful, and open relationships are the foundation of our practice. You've worked hard for your money and should feel confident with your investment choices as you make decisions for your financial future.

Meet Our Team



William A. Murphy
Private Wealth Financial Advisor
Managing Director - Investments

Will Murphy, Private Wealth Financial Advisor and Managing Director of Investments, has dedicated approximately 24 years to providing guidance to clients. He is passionate about helping others and enjoys knowing his clients are prepared for critical financial events in their lives. Will is a graduate of Furman University and was a member of the Furman's men's tennis team, where he received a Bachelor of Science in Business Administration. Will is active in the community and civic affairs. He currently serves on The Rose Ball Board, Artisphere Board, Greenville Country Club tennis committee, The Bon Secours St. Francis Foundation Board, and Poinsett Club Building and Grounds committee. Away from the office, Will enjoys spending time with his wife, Reid, Furman alumna and ophthalmologist with Medicus. They live with their two daughters in downtown Greenville.



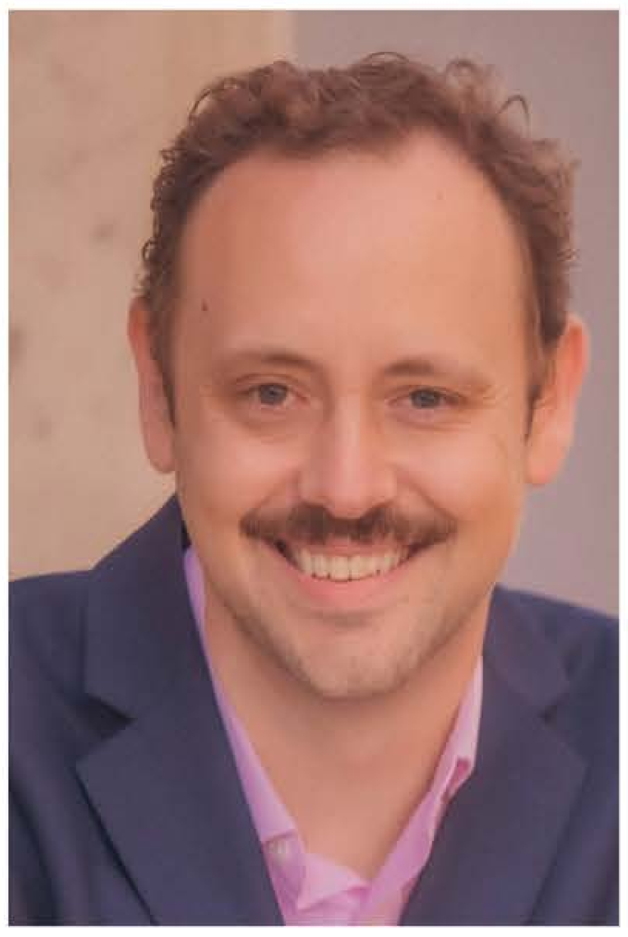
Claude C. Robinson, CWS®
Certified Wealth Strategist®
Senior Wealth Client Financial Advisor
Vice President - Investments

As a Financial Advisor, Claude helps clients navigate through various complex wealth management issues including deposit and investment management, private lending, trust administration, estate planning, business succession, philanthropy, and retirement planning. Claude works with high-net-worth business owners, entrepreneurs, executives, retirees, and their families in designing strategies to protect, grow and transfer wealth. Claude received his business degree from Lander University and was graduated from South Carolina School of Banking. He holds the Series 7 and 66 registrations, South Carolina Life, Accident, and Health licenses and is also a Certified Wealth Strategist. Claude has served as Lander University Trustee, GHS Children's Hospital Board, and multiple other community service organizations throughout his career. In his spare time, Claude enjoys hiking, biking, and any other outdoor activities.

Ryan B. Callaham
Financial Advisor

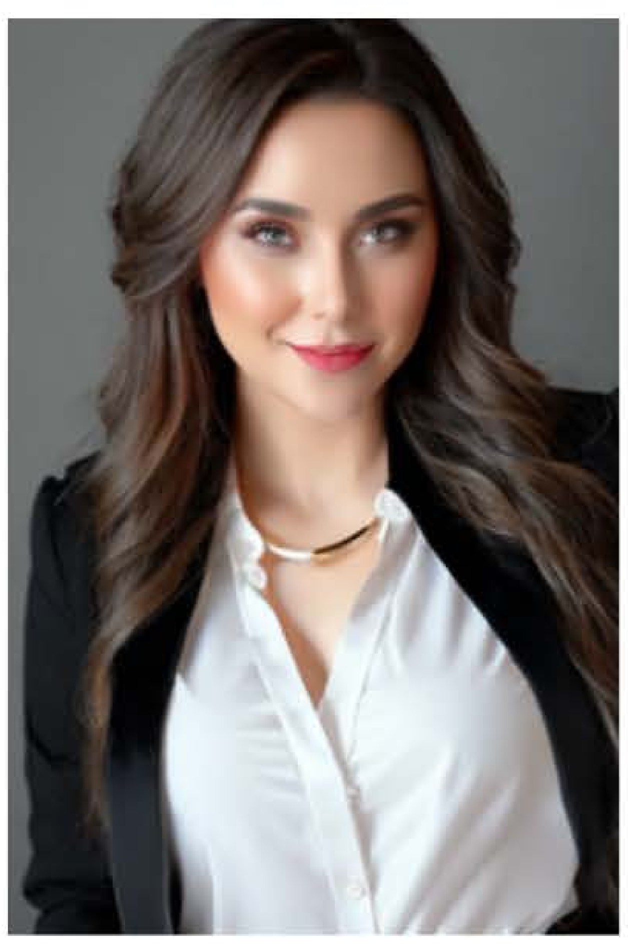
I strive to help each one of my clients plan for a financial future in a way that best meets his or her goals. In addition to helping my clients, I am committed to helping my community. I am currently involved with Habitat for Humanity and United Way. I started my career in the wealth and financial services industry in 2013 with Wells Fargo Bank and spent the last 6 years as a relationship manager to clients with complex needs. I graduated from Anderson University with a bachelor's degree in accounting and finance. Away from the office, I also enjoy golfing, hiking or planning trips to new destinations domestically and internationally. I've visited 17 countries and hope to see many more.

Meet Our Team



Daniel S. Willey
Senior Registered Client Associate

Daniel supports the team's daily operations, enhancing the client experience through excellent client service, preparing and maintaining financial reports, scheduling strategic client reviews and handling new client onboarding, money movement, income distribution and trading. He delivers exceptional personal client service providing clients with the account information and answers they need when they need them. Daniel was born in North Carolina and currently lives in Greenville with his wife Faith and their young daughter Ramsey. Daniel joined The Murphy Investment Group of Wells Fargo Advisors in 2010. He has been a Wells Fargo Advisors team member for over 13 years. He received his Bachelor of Arts from the University of North Carolina at Chapel Hill and holds Series 7 and 66 securities licenses. In his time away from the office, Daniel enjoys reading, cooking, painting, and enjoying the scenery and comforts of Greenville with his family..



Piper S. Dabney
Senior Client Associate

Piper began her career in financial services with Wells Fargo Bank in 2013 and joined Private Wealth Financial Advisor Will Murphy's team at Wells Fargo Advisors in 2023. She is currently a Senior Client Associate located in Greenville, SC. Piper majored in Psychology with a minor in Sociology and this has led her appreciate the significance of developing relationships and genuinely understanding the complete perspective of a client's life to meet their unique requests and needs. Piper is a native of Northern California but now resides in Greenville, SC. In her free time she enjoys travel, running, and spending time with her 2 dogs.

Recent Awards for Will Murphy

- Forbes Best-In-State Wealth Advisors, 2020, 2021, 2022, 2023, 2024
- Barron's Top 1,200 State by State Advisors, 2020, 2021, 2022, 2023, 2024
- Wells Fargo Advisor Platnium Council, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024

2024 Forbes Best-In-State Wealth Advisors: Awarded April 2024; Data compiled by SHOOK Research LLC based on the time period from 6/30/22 - 6/30/23 (Source: Forbes.com)

2023 Forbes Best-In-State Wealth Advisors: Awarded April 2023; Data compiled by SHOOK Research LLC based on the time period from 6/30/21 - 6/30/22 (Source: Forbes.com)

2022 Forbes Best-In-State Wealth Advisors: Awarded April 2022; Data compiled by SHOOK Research LLC based on the time period from 6/30/20 - 6/30/21 (Source: Forbes.com)

2021 Forbes Best-In-State Wealth Advisors: Awarded February 2021; Data compiled by SHOOK Research LLC based on the time period from 6/30/19 - 6/30/18 (Source: Forbes.com)

2020 Forbes Best-In-State Wealth Advisors: Awarded January 2020; Data compiled by SHOOK Research LLC based on the time period from 6/30/18 - 6/30/19 (Source: Forbes.com)

The Forbes Best-in-State Wealth Advisors rating algorithm is based on the previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

2024 Barron's Top 1,200 State By State Advisors: Awarded March 2024; Data Compiled by Barron's based on the time period from Oct. 2022 - Sept. 2023 (Source: Barrons.com)

2023 Barron's Top 1,200 State By State Advisors: Awarded March 2023; Data Compiled by Barron's based on the time period from Oct. 2021 - Sept. 2022 (Source: Barrons.com)

2022 Barron's Top 1,200 State By State Advisors: Awarded March 2022; Data Compiled by Barron's based on the time period from Oct. 2020 - Sept. 2021 (Source: Barrons.com)

2021 Barron's Top 1,200 State By State Advisors: Awarded March 2021; Data Compiled by Barron's based on the time period from Oct. 2019 - Sept. 2020 (Source: Barrons.com)

2020 Barron's Top 1,200 State By State Advisors: Awarded March 2020; Data Compiled by Barron's based on the time period from Oct. 2018.- Sept. 2019 (Source: Barrons.com)

he Barron's Top 1,200 State By State Advisors ratings are based on the previous year's assets under management, revenue generated for the advisors' firms, and the quality of the advisors' practices. Investment performance isn't an explicit factor because clients have varied goals and risk tolerances. Self-completed questionnaire was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

The Platinum Council (previously known as Premier Advisor) distinction is held by a select group of Financial Advisors within Wells Fargo Advisors as measured by completion of educational components, business production based on the past year, and professionalism. Additional criteria, best practices and team structure, may also be used to determine recipients.

Daniel S. Willey

Senior Registered Client Associate

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Piper S. Dabney

Senior Registered Client Associate

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Client Associate Staff

Our Client Associate team focuses on specific roles and integrate their talents to help deliver comprehensive service to our clients.

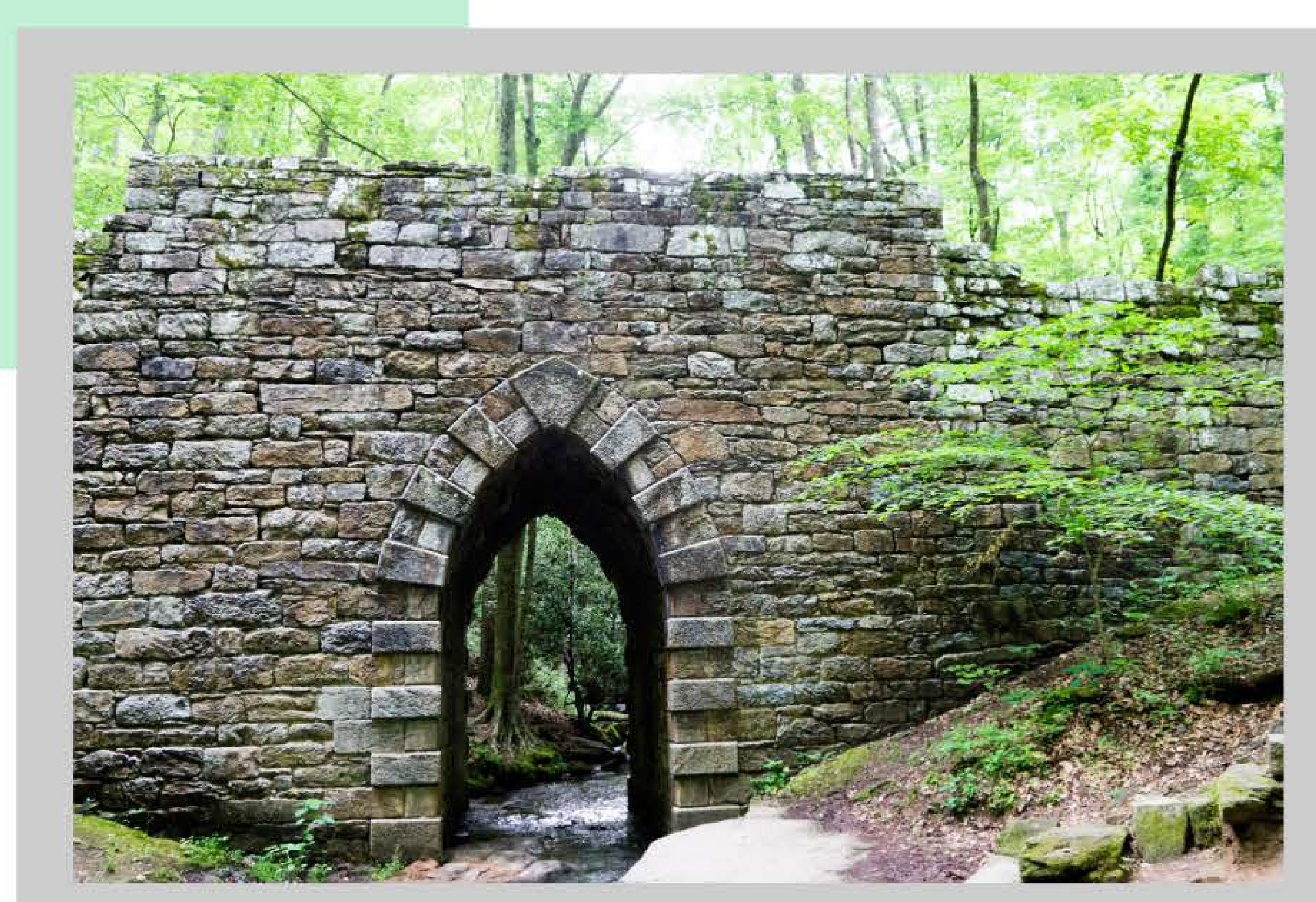
First in line of assistance for all your questions and needs

Booking of appointments for portfolio reviews

Assistance with statements and online access

Proactive reviewing of account setup and maintenance

Setup of cash flows and withdrawal requests as required



Defining Tomorrow, **today...**

It's as true for financial and investment matters as it is for life in general: planning for the future helps you focus on where you're headed and feel confident in where you stand in relation to your goals and intentions.

By blending the human dimension of personal goal-setting with innovative technology, our planning process goes way beyond simply aiming for a dollar amount or trying to match a performance benchmark.

Our personalized planning process

We place the highest priority on helping you meet your wealth management goals. In charting your course for the future, we use advanced technology and a robust, innovative planning process which helps enable you to enjoy your life today and pursue your goals for tomorrow.

This process offers you and our team the tools and technology you needed to discuss your life expectations, decide on an appropriate investment strategy, track your progress, and re-sync – or rethink – your approach whenever necessary.

Step 1 – Understanding your goals

1

- Conduct a personal interview with you to learn about your needs
- Consult with your other professionals to understand your full financial picture

Step 2 – Delveloping your plan

2

- Based on a deep understanding of your financial situation and your goals, we'll work with you to develop a plan that is unique to your situation
- We'll use the plan findings to define the parameters for successfully meeting your financial goals, including a recommended investment allocation

Step 3 – Implementing your strategy

3

- Proceed with recommendations and implement the plan
- Outline and establish systematic investment, income, and tentative rebalancing schedules

Step 4 - Tracking your progress

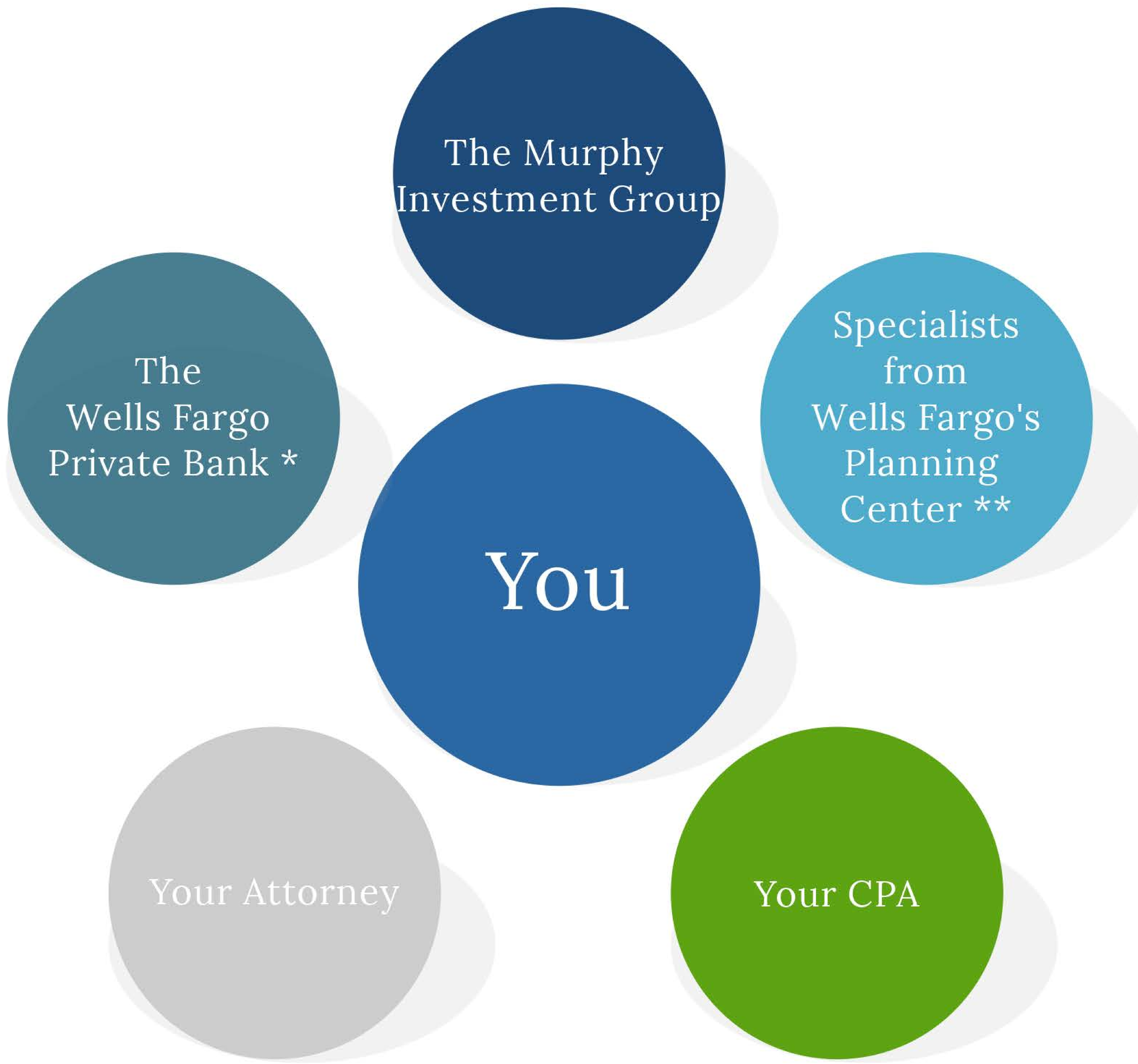
4

- Revise your plan based on changes in your life, such as retirement, weddings, and travel
- Make adjustments to your asset allocation as warranted

Serving our clients by leveraging a **team-based** approach...

Our experience has shown the myriad of ways to manage significant wealth can exceed the knowledge base of one financial advisor. That's why we embrace the value of a team approach to address our client's unique challenges and opportunities.

We plan for and address the complexities of wealth management by drawing on vast resources within Wells Fargo Advisors as well as providing clients access to specialists within Wells Fargo Bank. Additionally, we collaborate with our clients' other professionals to help guide the implementation of a fully integrated plan.



The Wells Fargo Private Bank (The Private Bank) experience connects clients with products and services provided by Wells Fargo Bank, N.A. and/or Wells Fargo Advisors. Wells Fargo Bank, N.A. provides investment management services as part of its trust and fiduciary services, deposit products, lending products and other bank products. Wells Fargo Advisors provides investment advisory and brokerage services. Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, Member SIPC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company. Wells Fargo affiliates, including Financial Advisors of Wells Fargo Advisors, may be paid an ongoing or one￾time referral fee in relation to clients referred to the Bank. For Bank products and services, the Bank is responsible for the day-to-day management of any referred accounts. Eligibility for The Private Bank experience is subject to change without prior notice. Products and services may have qualification or pre-acceptance requirements that are different than the eligibility requirements for The Private Bank experience.

Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, Member SIPC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company

** Products and Services offered through Wells Fargo affiliates.

* Products and Services offered through Wells Fargo Bank, N.A.