

VAN LIEW TRUST COMPANY

Organizational Chart

OPERATIONS & ADMINISTRATION

Kevin M. Oates
Partner
President
Chief Operating Officer
With VL since 1991

Kathleen Ferreira
Vice President
With VL since 1987

Michele A. Pimentel
Administrative Assistant
and Trader
With VL since 1994

Susan M. Barboza
Administrative Assistant
With VL since 1999

Jamie L. Jacavone
Administrative Assistant
With VL since 1992

Elizabeth B. Van Liew
Administrative Assistant
With VL since 2009

INVESTMENT PROFESSIONALS

Alfred B. Van Liew
Founding Partner
Chief Executive Officer
and Portfolio Manager
With VL since 1984

Samuel H. Hallowell, Jr.
Founding Partner
Senior Vice President
Senior Portfolio Manager
With VL since 1984

Joseph J. Healy
Portfolio Manager
Senior Vice President
Chief Compliance Officer
Head Trader
With VL since 1992

James M. Powell
Vice President
Portfolio Manager
With VL since 2018

Wade M. Walbrun
Senior Vice President
Equity Analyst
With VL since 1993

Edward K. Staples
Portfolio Manager
Vice President
With VL since 2006

Charles A. Calverley, Jr.
Portfolio Manager
(Semi-Retired)*
Vice President
With VL since 1992

Gary B. Caplinger
Portfolio Manager
(Semi-Retired)
Senior Vice President
With VL since 2018

* This officer continues to work with a few long-time clients.