

# 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

**Lydia R. Owen**  
Vice President  
Portfolio Manager  
With VL since 2022