Chicago Partners

Q1 2026 Quarterly Conference Call

January 8th, 2026

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See final slide for full disclosure information.

Today's Speakers

Jim Hagedorn, CFA
Founder & Managing Partner

Anthony Halpin
Founder & Chief Financial Officer

Dan Toledo, CFA, CFP®
Partner

Nicole Polanco, CFP®
Senior Wealth Advisor

Grace Harlan
Wealth Advisor

Today's Agenda

U.S. Economic Data

Economic Indicators

Evolving Portfolio DNA

Client Experience

Client Access

Q&A

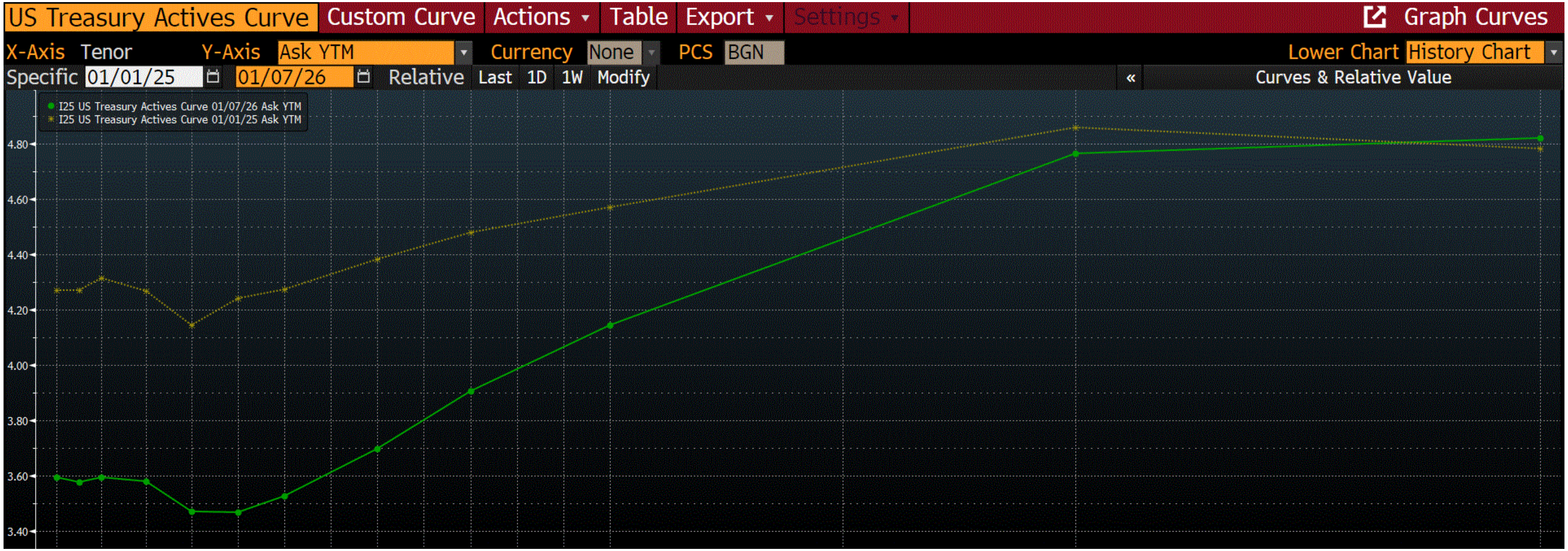
Quote

"Our capital markets continue to evolve. Relative to index fund investing, for taxable investors, we can do much more to generate stronger net, after-tax compounded portfolio returns. In 2026, we will be discussing with you how tax aware solutions will benefit you and your portfolio.

Best wishes for a wonderful New Year!"

- Chicago Partners Wealth Advisors

The U.S. Treasury Yield Curve



Source: Bloomberg

The U.S. Treasury Yield Curve

US Treasury Actives Curve | Custom Curve | Actions | Chart | Export | Settings | Graph Curves

X-Axis Tenor Y-Axis Ask YTM Currency None PCS BGN

Specific 01/01/25 01/07/26 Relative Last 1D 1W Modify « Curves & Relative Value

Values and Members Values Members Constituents

		I25 Ask YTM US Treasury Actives Curve 01/07/26		I25 Ask YTM US Treasury Actives Curve 01/01/25		I25 Ask YTM (Change) 01/07/26-01/01/25
	Tenor	Description	Yield	Description	Yield	Yield
11)	1M	GBM Govt	3.593	Same	4.271	-67.8
12)	2M	GB2 Govt	3.575	Same	4.270	-69.5
13)	3M	GB3 Govt	3.593	Same	4.314	-72.1
14)	6M	GB6 Govt	3.578	Same	4.266	-68.8
15)	1Y	GB1 Govt	3.471	Same	4.143	-67.2
16)	2Y	GT2 Govt	3.467	Same	4.242	-77.4
17)	3Y	GT3 Govt	3.525	Same	4.273	-74.8
18)	5Y	GT5 Govt	3.698	Same	4.382	-68.4
19)	7Y	GT7 Govt	3.906	Same	4.479	-57.3
20)	10Y	GT10 Govt	4.144	Same	4.569	-42.5
21)	20Y	GT20 Govt	4.764	Same	4.858	-9.4
22)	30Y	GT30 Govt	4.821	Same	4.781	4.0

Source: Bloomberg

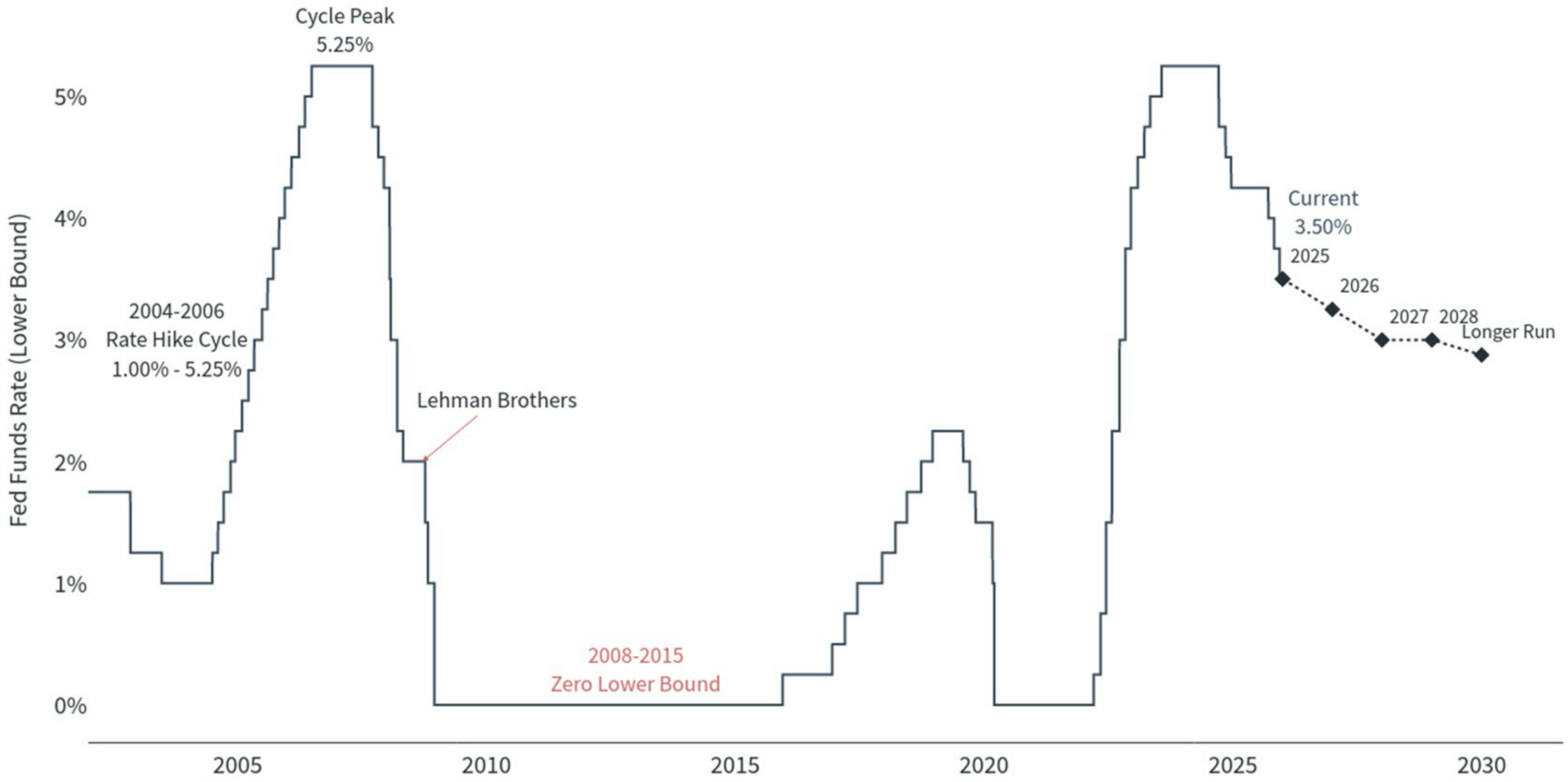
World Interest Rate Probability

Meeting	#Hikes/Cuts	%Hike/Cut	Imp. Rate Δ	Implied Rate
01/28/2026	-0.116	-11.6%	-0.029	3.613
03/18/2026	-0.460	-34.3%	-0.115	3.527
04/29/2026	-0.676	-21.7%	-0.169	3.472
06/17/2026	-1.243	-56.7%	-0.311	3.331
07/29/2026	-1.576	-33.3%	-0.394	3.248
09/16/2026	-1.943	-36.7%	-0.486	3.156
10/28/2026	-2.156	-21.3%	-0.539	3.102
12/09/2026	-2.353	-19.7%	-0.588	3.053
01/27/2027	-2.376	-2.3%	-0.594	3.047
03/17/2027	-2.394	-1.8%	-0.598	3.043
04/28/2027	-2.346	+4.8%	-0.587	3.055

Source: Bloomberg

Federal Funds Rate

Target Range Lower Limit



Source: Kitces

Jim Hagedorn, CFA
Founder & Managing Partner

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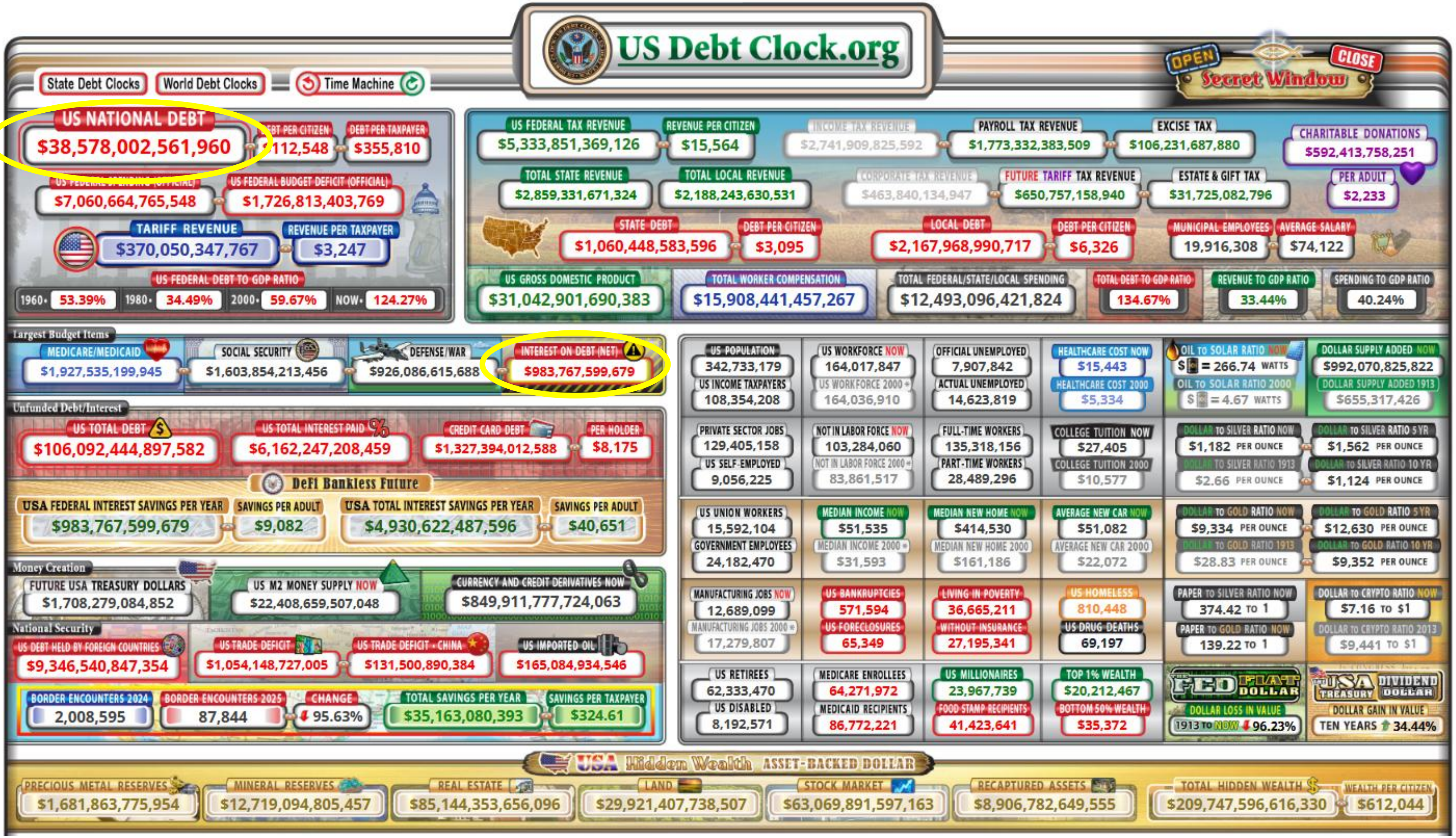

Jim Hagedorn, CFA
Founder & Managing Partner

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The Market Return Equation

$$\textit{Market Return (RM)} = E + Y + \Delta\, P/E$$

Large Cap Market Return (RM) = E + Y + Δ P/E

Market Return (RM) = 11.29 + 1.20 + Δ P/E

S&P 500 INDEX

Periodicity A | Flavor F12 | View Growth | Currency USD

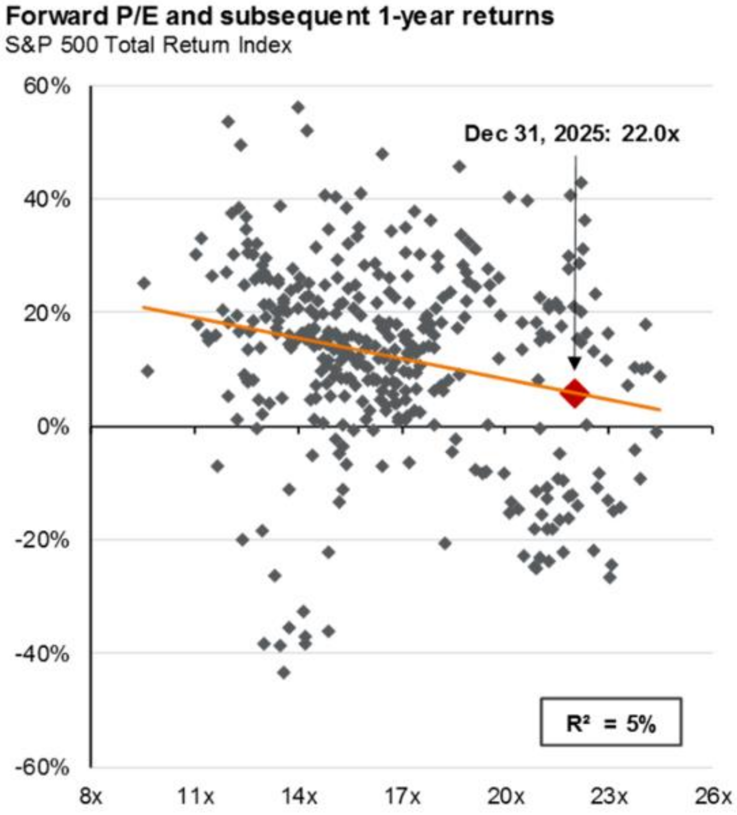
Measure	Actual	F12 Est	Growth	Y+1 Est	Growth	Y+2 Est	Growth
1) Earnings Per Share	269.26	299.65	11.29%	343.37	14.59%	379.69	10.58%
2) EPS before XO, Positive	246.30	279.28	13.39%	322.36	15.42%	357.83	11.00%
3) Cash Flow Per Share	314.02	439.79	40.05%	478.07	8.70%	768.63	60.78%
4) Dividends Per Share	79.15	83.12	5.01%	88.14	6.05%	107.20	21.62%
5) Book Value Per Share	1252.22	1402.97	12.04%	1581.45	12.72%	2801.37	77.14%
6) Sales Per Share	1947.15	2079.78	6.81%	2226.25	7.04%	2361.38	6.07%
7) EBITDA Per Share	425.55	476.88	12.06%	537.95	12.81%	591.82	10.01%
8) Long Term Growth	0.00	10.70	0.00%	0.00	0.00%	0.00	0.00%
9) Net Debt Per Share	665.10	548.61	-17.51%	494.67	-9.83%	419.83	-15.13%
10) Enterprise Value Per Share	7609.40	7493.43	-1.52%	7439.49	-0.72%	7364.65	-1.01%

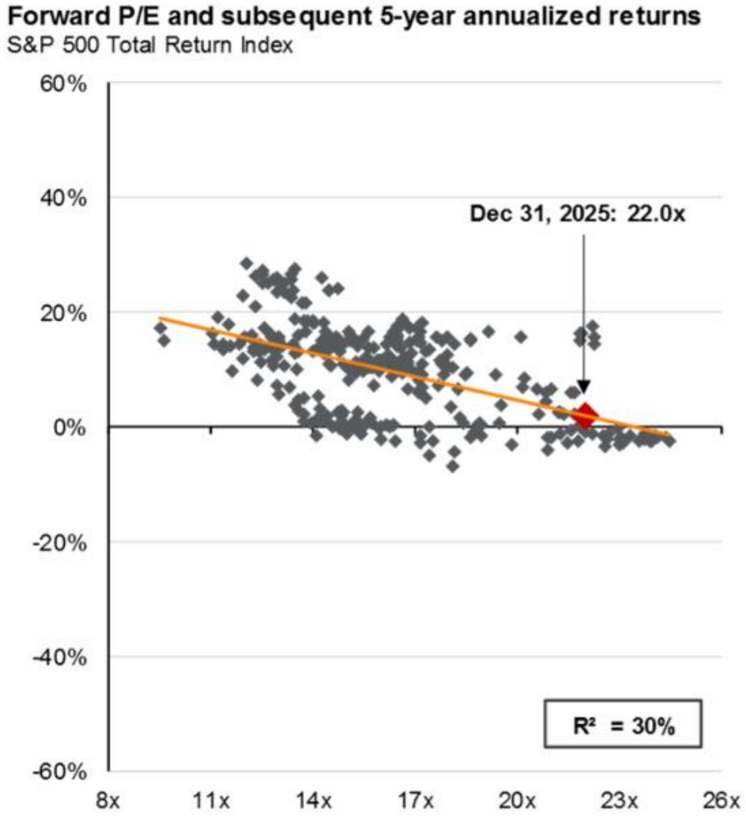
Valuation Measure	Actual	F12 Est	Y+1 Est	Y+2 Est
11) Price/EPS	25.79	23.18	20.23	18.29
12) Price/EPS before XO, Positive	28.20	24.87	21.54	19.41
13) Price/Cash Flow	22.12	15.79	14.53	9.04
14) Dividend Yield	1.14	1.20	1.27	1.54

Source: Bloomberg

P/E Ratios and Equity Returns

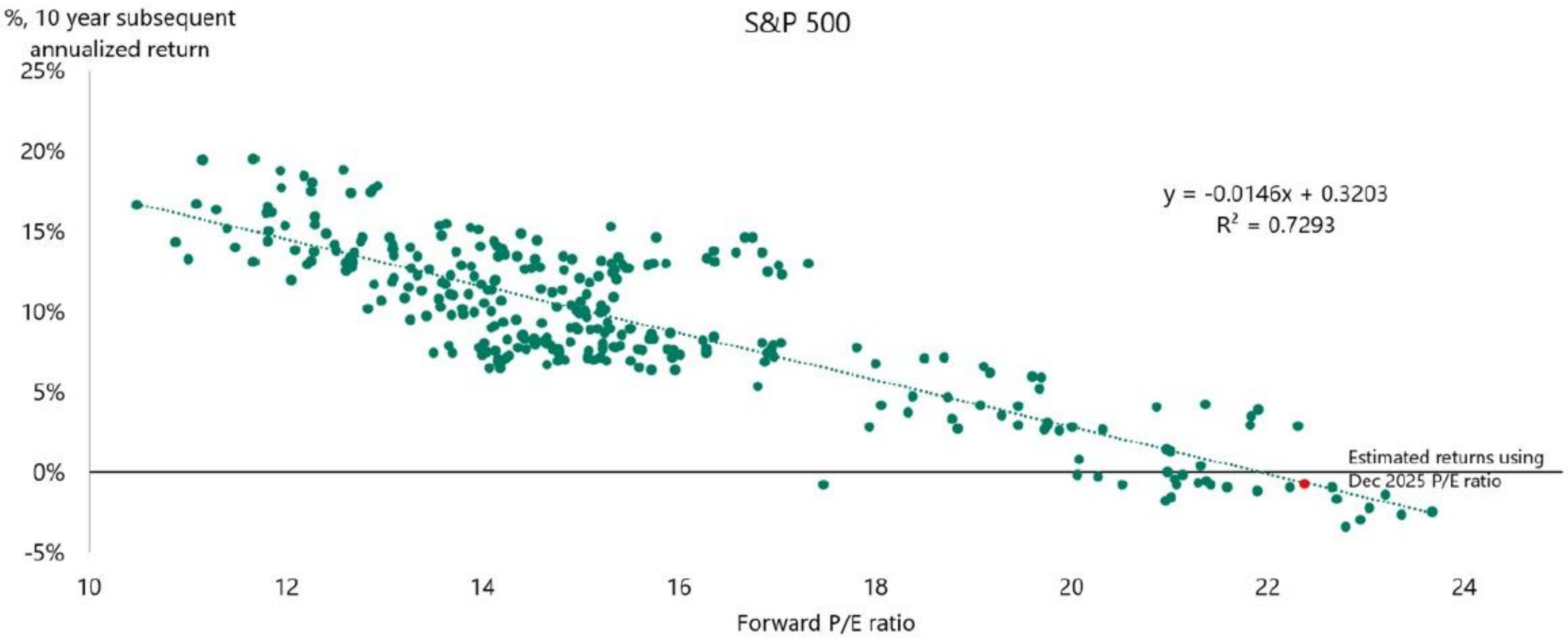
P/E ratios and equity returns





Source: JP Morgan "Guide to the Markets"

The S&P 500 Forward P/E Ratio vs. Subsequent 10-Year Annualized Returns



Source: Kinsale Trading LLC, Apollo

P/E Ratio Research

Scenario	Implied P/E	Notes
Historical Average (17x)	17-18	Historically, the long-run average P/E for the S&P 500 (going back decades) clustered around 17-18x. This reflects a lower-liquidity, higher-rate, pre-2000 environment.
New Norm Low (20x)	20	Since 2010, structural shifts (lower discount rates, higher tech weighting, stronger profitability) have pushed median multiples higher. Even the lower bound of the new environment rarely revisits 17x.
New Norm Mid (21.5x)	21.5	Empirically, post-2019 medians cluster here. It represents the middle of a more liquidity-abundant, lower-rate regime, even excluding COVID extremes.
New Norm High (23x)	23	Anchors the "new upper band." In line with current levels, consistent with an equity market where 30-35% of index earnings come from high-margin tech platforms.
Current Baseline	23.18	Actual trailing P/E today. This sits right at the top of the proposed new-normal band, suggesting that calling today "slightly rich" is more accurate than "massively overvalued."

Source: Federal Reserve Economic Data, JP Morgan "Guide to the Markets", Chicago Partners Wealth Advisors

Mid Cap Market Return (RM) = E + Y + Δ P/E

Market Return (RM) = 12.43 + 1.59 + Δ P/E

S&P Midcap 400 Index

Periodicity A | Flavor F12 | View Growth | Currency USD

Measure	Actual	F12 Est	Growth	Y+1 Est	Growth	Y+2 Est	Growth
1) Earnings Per Share	179.93	202.29	12.43%	231.28	14.33%	248.21	7.32%
2) EPS before XO, Positive	159.29	178.38	11.99%	205.46	15.18%	218.96	6.57%
3) Cash Flow Per Share	269.70	384.61	42.61%	356.31	-7.36%	0.00	0.00%
4) Dividends Per Share	46.72	54.65	16.96%	59.50	8.89%	80.19	34.76%
5) Book Value Per Share	1248.48	1385.49	10.97%	1531.66	10.55%	2042.82	33.37%
6) Sales Per Share	2229.01	2323.48	4.24%	2445.22	5.24%	2651.02	8.42%
7) EBITDA Per Share	320.92	374.17	16.59%	405.63	8.41%	447.55	10.34%
8) Long Term Growth	0.00	10.97	0.00%	0.00	0.00%	0.00	0.00%
9) Net Debt Per Share	821.28	988.97	20.42%	934.39	-5.52%	754.82	-19.22%
10) Enterprise Value Per Share	4253.40	4432.40	4.21%	4377.82	-1.23%	4198.25	-4.10%

Valuation Measure	Actual	F12 Est	Y+1 Est	Y+2 Est
11) Price/EPS	19.14	17.02	14.89	13.87
12) Price/EPS before XO, Positive	21.62	19.30	16.76	15.73
13) Price/Cash Flow	12.77	8.05	9.66	0.00
14) Dividend Yield	1.36	1.59	1.73	2.33

Source: Bloomberg

Small Cap Market Return (RM) = E + Y + Δ P/E

Market Return (RM) = 9.82 + 2.46 + Δ P/E

S&P Small Cap 600 Index

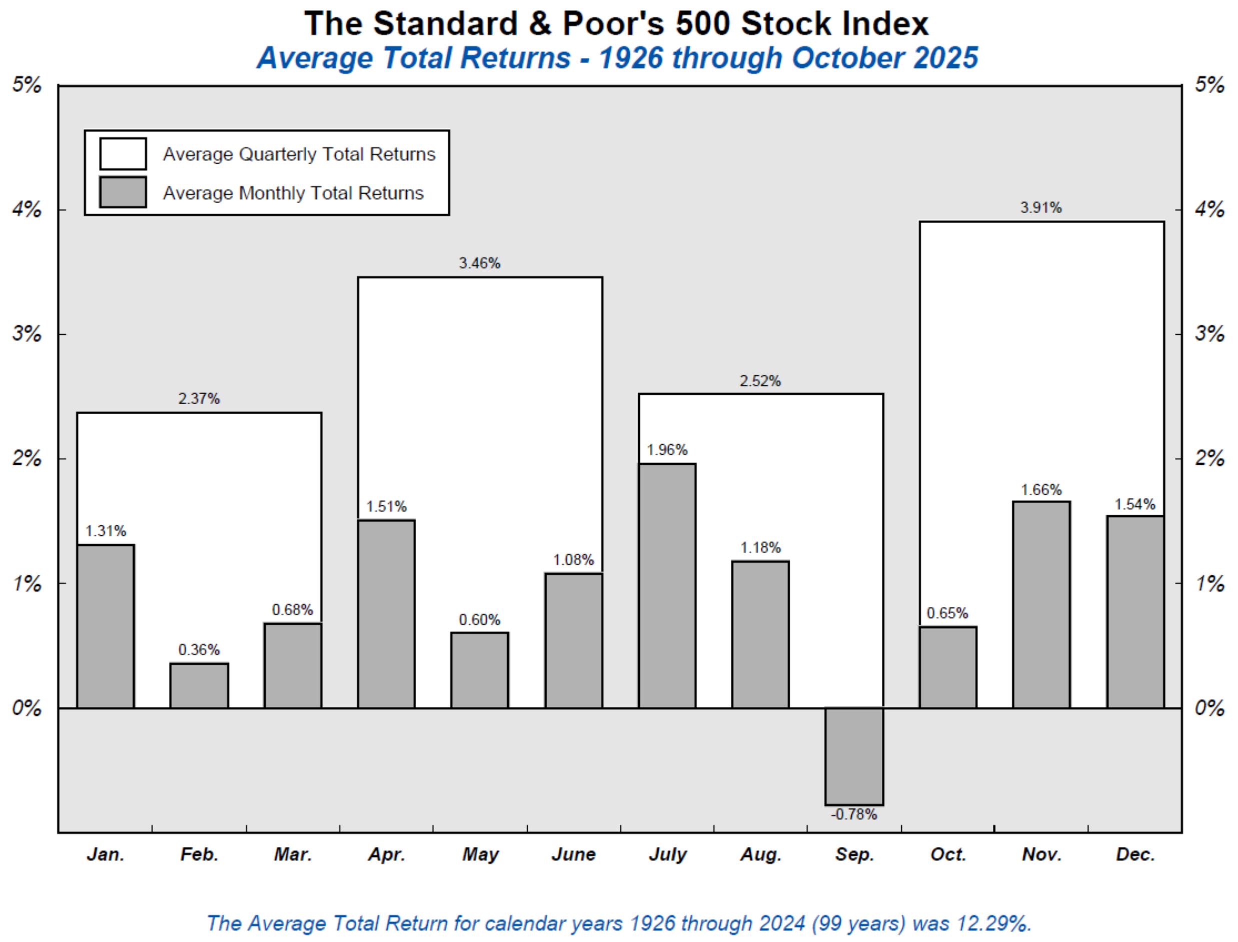
Periodicity A | Flavor F12 | View Growth | Currency USD

Measure	Actual	F12 Est	Growth	Y+1 Est	Growth	Y+2 Est	Growth
1) Earnings Per Share	86.93	95.47	9.82%	113.38	18.77%	131.09	15.61%
2) EPS before XO, Positive	75.37	87.07	15.54%	104.31	19.79%	124.22	19.09%
3) Cash Flow Per Share	129.16	445.32	244.77%	428.42	-3.79%	0.00	0.00%
4) Dividends Per Share	25.14	37.41	48.78%	37.76	0.95%	0.00	0.00%
5) Book Value Per Share	764.54	1187.40	55.31%	1027.74	-13.45%	1103.32	7.35%
6) Sales Per Share	1198.74	1333.39	11.23%	1378.72	3.40%	1561.82	13.28%
7) EBITDA Per Share	160.99	223.19	38.64%	245.72	10.09%	278.06	13.16%
8) Long Term Growth	0.00	0.00	0.00%	0.00	0.00%	0.00	0.00%
9) Net Debt Per Share	649.71	600.76	-7.53%	471.15	-21.57%	578.30	22.74%
10) Enterprise Value Per Share	2178.73	2123.78	-2.52%	1994.17	-6.10%	2101.32	5.37%

Valuation Measure	Actual	F12 Est	Y+1 Est	Y+2 Est
11) Price/EPS	17.52	15.95	13.43	11.62
12) Price/EPS before XO, Positive	20.21	17.49	14.60	12.26
13) Price/Cash Flow	11.79	3.42	3.55	0.00
14) Dividend Yield	1.65	2.46	2.48	0.00

Source: Bloomberg

The Standard & Poor's 500 Stock Index



Source: Standard & Poor's Corporation; Crandall, Pierce & Company

Economic Indicators

Optimal Recessionary Conditions and Leading Economic Indicators

Checklist: Optimal Recessionary Conditions

- **Accelerating Inflation –** No, inflation is slowing
- **Inverted Yield Curve** – No, the curve is kinked
- **Employment Declining** – U.S. unemployment is 4.6%. Concerns with AI.
- **29 Months After First Rate Hike** – No, Fed cut rates 0.25% in December
- **P/E Above 17** – Yes, the forward P/E is 23.18
- **10-Year Treasury Above 6.6%** – No, it is 4.14%
- **Bonds More Attractive Than Stocks** – No
- **Dividend Yield Decreasing** – No

Legend

Cautionary Reading

Moderate Reading

Positive Reading

Leading Economic Indicators

Economic Survey Results

Real GDP growth is expected to increase by 1.9 percent in 2026, nearly the same as last quarter's 12-month-ahead forecast. The CFO Optimism Index for the overall economy has softened somewhat, falling from 62.9 last quarter to 60.2 this quarter (on a scale from 0 to 100).

The top concern among U.S. CFOs remains tariffs, though their extent of concern is smaller than it was last quarter. Other top five concerns include demand for products and services, labor quality and skills mismatch, monetary policy, and inflation.

Conference Board Leading Economic Index

98.30 – Down slightly from 98.40 last quarter

CEO Confidence Index: CEO Confidence in the Economy 1 Year From Now

6.37 – Up from 5.69 last quarter.

Legend

- Cautionary Reading
- Moderate Reading
- Positive Reading

Dan Toledo, CFA, CFP®
Partner

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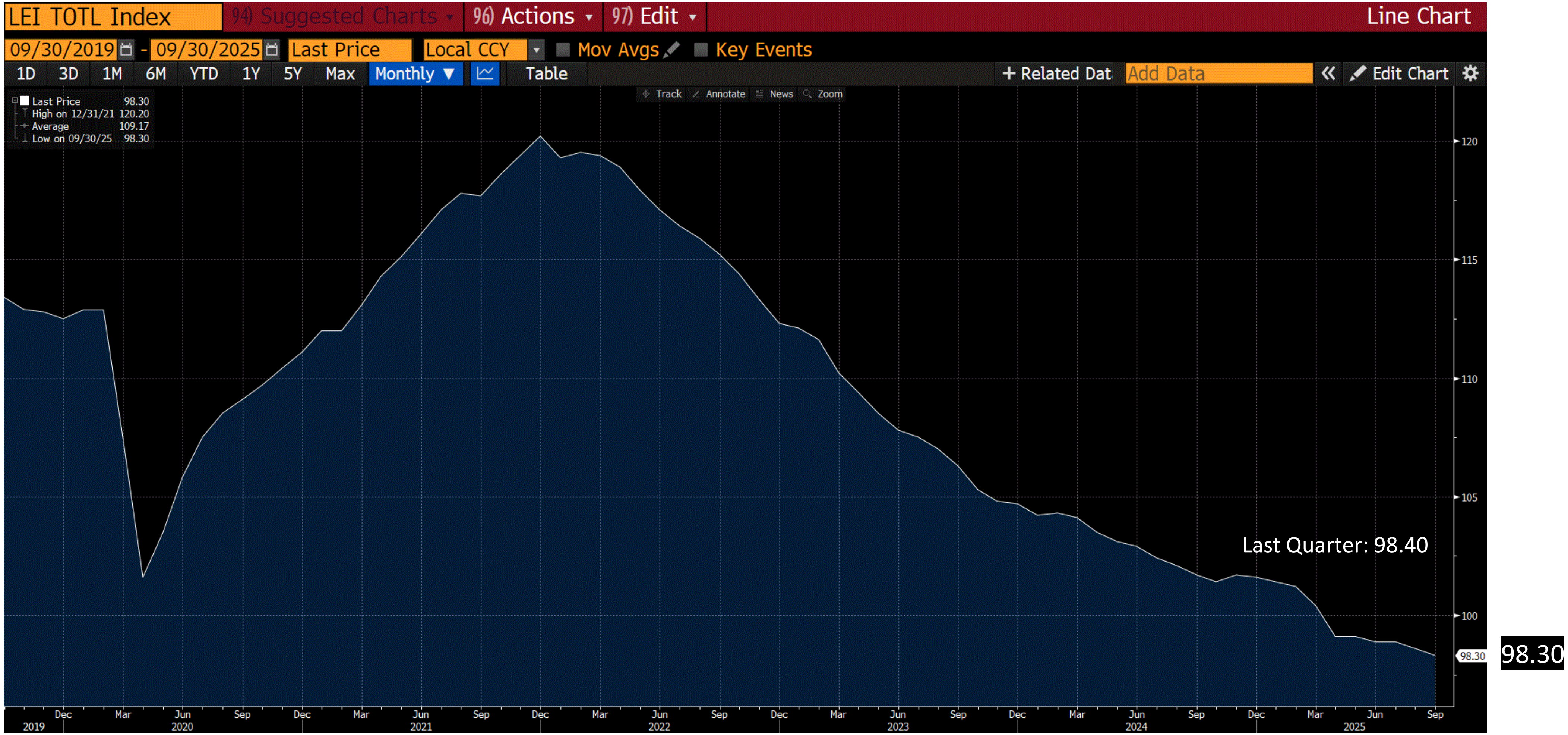
U.S. Conference Board Leading Index



Source: Bloomberg

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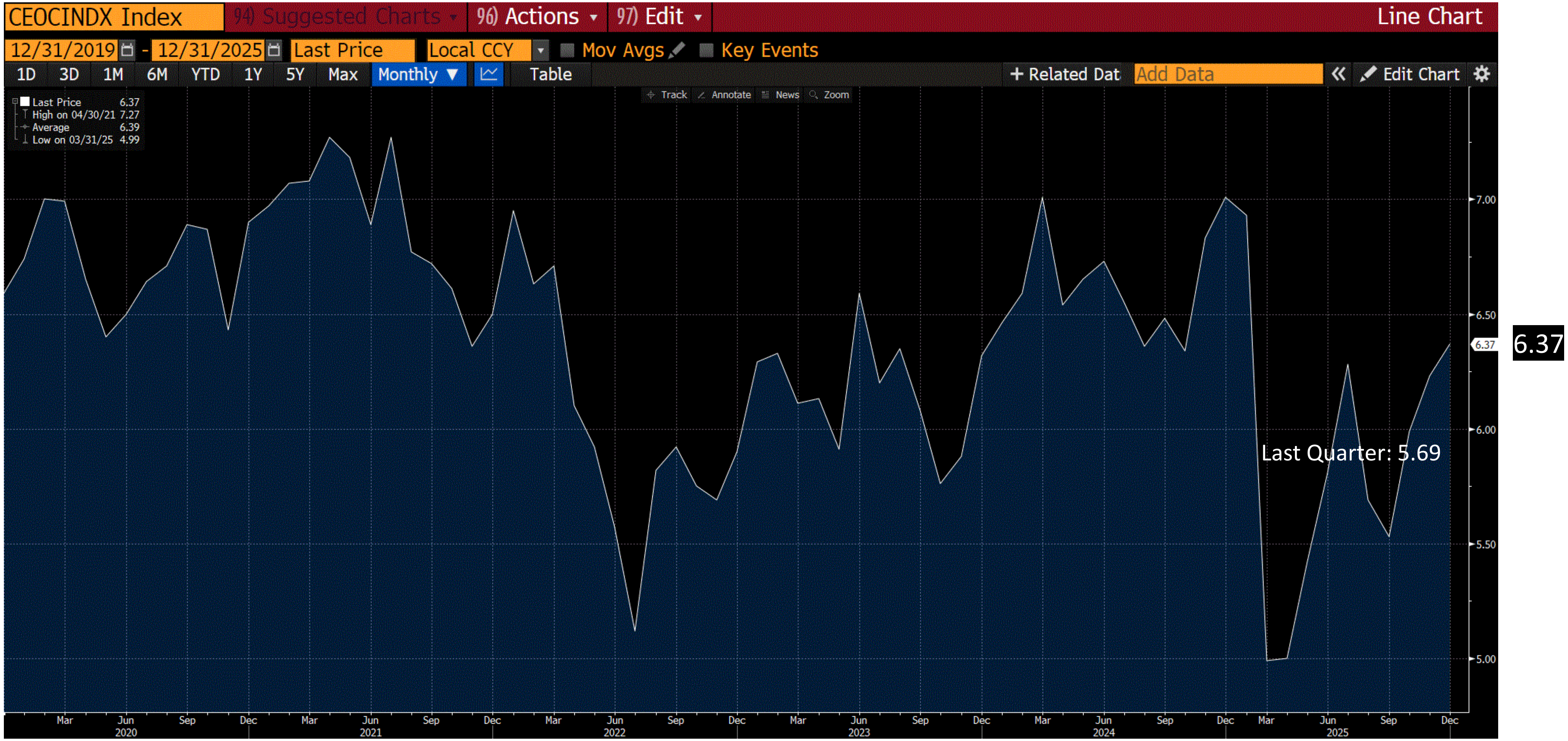
Partner

CEO Confidence Index (Economy 1 Year from Now)



Source: Bloomberg

Dan Toledo, CFA, CFP®
Partner

Evolving Portfolio DNA

Updates on the Chicago Partners Investment Strategy

Evolving Portfolio DNA

Public Securities
Ex. Public Equity & Fixed Income

Traditional Portfolio

Public Securities
Ex. DFA Funds & Stocks

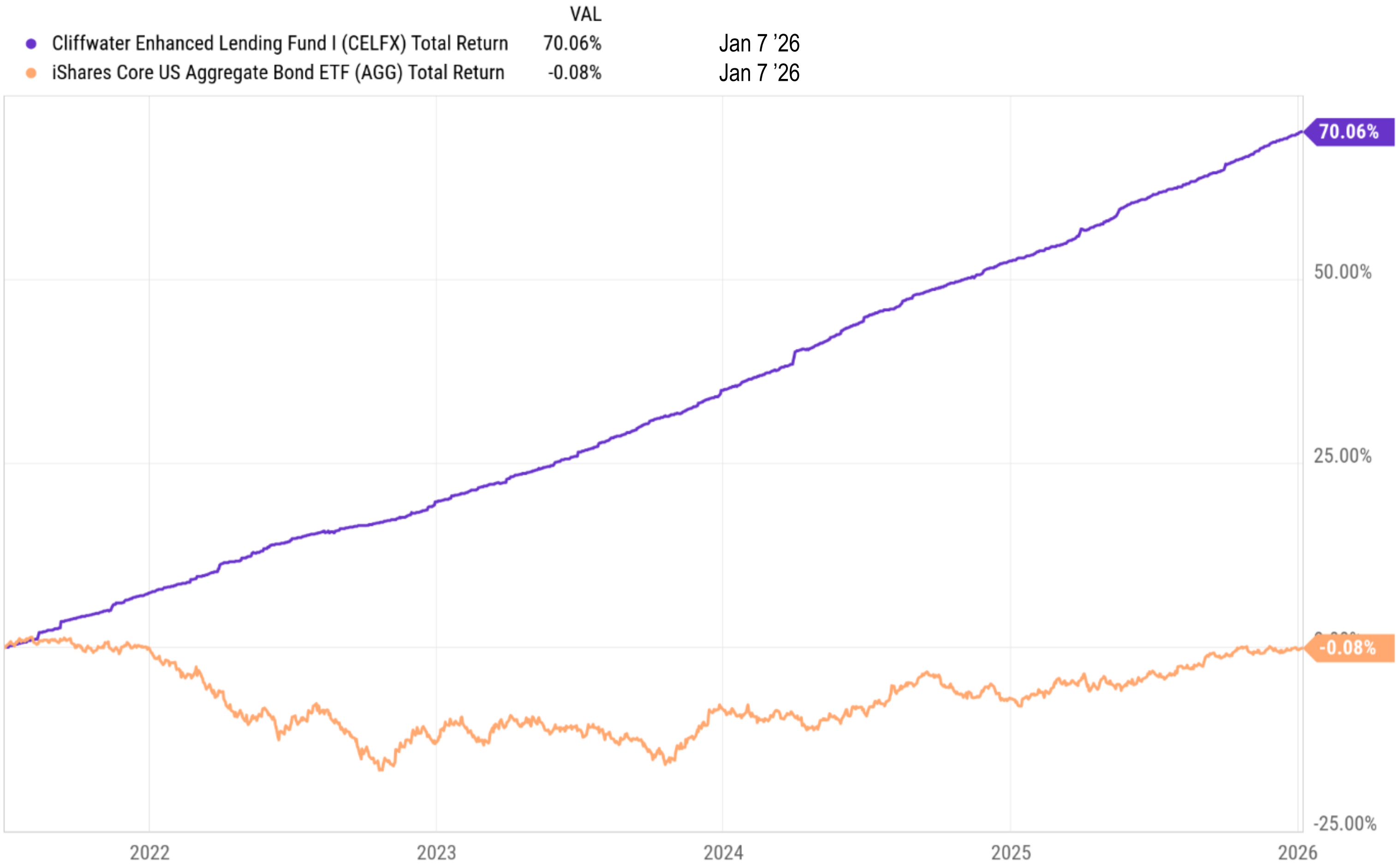
Hybrid Securities
Ex. Interval Funds (Cliffwater)

Private Securities
Ex. Private Equity & Credit

Evolving Portfolio

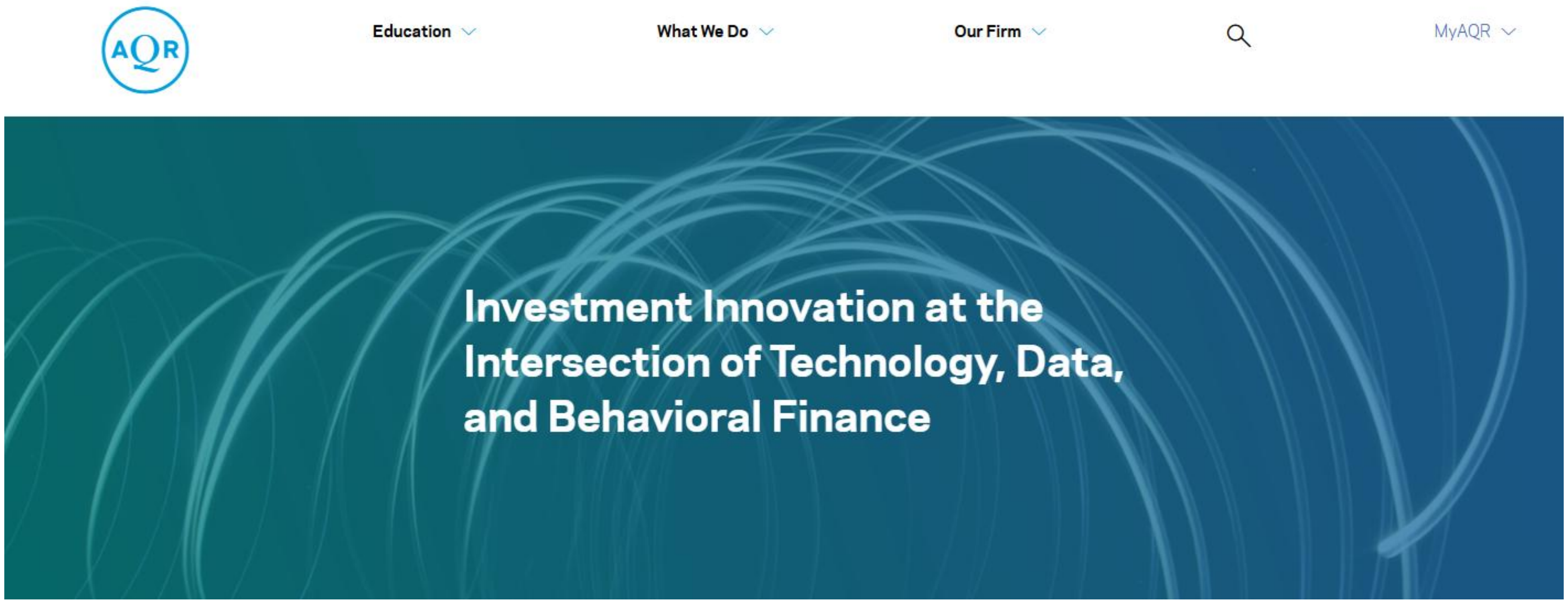
Major Leagues
CP's Strong Performers

Cliffwater Enhanced Lending Fund (CELFX)



Cliffwater Enhanced *Lending (CELFX) versus the Bloomberg Barclays Bond Index (AGG)* <u>*since **inception***</u>

AQR



Source: AQR

QNZIX

QNZIX US Equity | Export ▾ | Page 2/5 Security Description

Profile | Performance | Holdings | Organizational | Share Classes

QNZIX Metrics 01/06/26 G001 Metrics As Of N.A.

Return

Per	Fund	Index	Peers	PCTL
1 Wk	2.85	.00	1.01	97
1 Mo	4.95	.00	1.72	97
3 Mo	7.98	.00	2.96	94
YTD	3.42	.00	1.47	95
1 Yr	26.52	.00	15.15	93
3 Yr	27.37	.00	11.32	99
5 Yr	--	.00	7.00	--
2025	23.26	--	14.33	93
2024	34.73	--	9.41	97
2023	23.56	--	10.83	98
2022	15.46	--	-11.21	99
2021	--	--	14.49	--
2020	--	--	7.46	--
2019	--	--	16.93	--
2018	--	--	-6.33	--
2017	--	--	11.17	--
2016	--	--	7.92	--

Tracking (1Yr) vs Index	
Excess Return	N.A.
Beta	N.A.
Alpha	N.A.
Correlation	N.A.
Treynor	-.009
R-Squared	0.022
Information Ratio	N.A.
Tracking Error	N.A.

6) Dividend | DVD »

Per	Curr	Income	Cap. Gain
YTD	USD	.00	.00
2025	USD	.1717	.00
2024	USD	2.2162	.00
2023	USD	2.6493	.00
2022	USD	.2401	.004
2021	USD	.00	.00

Absolute (1Yr)	Fund	Index	Peers
Sharpe Ratio	1.74	.40	1.14
Volatility	11.61	.07	9.73
Sortino Ratio	1.36	.40	1.02
Downside Risk	9.45	.05	7.48

5) Peer Group | FSRC »

1 Yr	Rtn %	Vol %
Average	15.15	9.73
Std Deviation	7.27	3.42
Median	14.16	9.55

Dividend Statistics	
12 Month Yield	1.04%
Net Indicated Yield	1.04%
1 Yr Dividend Growth	-92.25%
3 Yr Dividend Growth	-11.07%
5 Yr Dividend Growth	N.A.
Dividend Frequency	Annual

Source: Bloomberg

QLEIX

QLEIX US Equity | Export ▾ | Page 2/5 Security Description

Profile | Performance | Holdings | Organizational | Share Classes

QLEIX Metrics 01/06/26

Return

Per	Fund	Index	Peers	PCTL
1 Wk	-.09	--	.91	9
1 Mo	3.73	--	1.79	87
3 Mo	8.70	--	3.06	98
YTD	.14	--	1.37	11
1 Yr	32.96	--	12.95	93
3 Yr	28.76	--	12.49	97
5 Yr	26.79	--	9.25	98
2025	34.43	--	12.18	93
2024	30.06	--	12.72	93
2023	24.38	--	13.04	87
2022	19.11	--	-5.19	95
2021	31.10	--	17.64	83
2020	--	--	7.07	--
2019	--	--	11.38	--
2018	-16.32	--	-6.27	5
2017	15.73	--	12.77	69
2016	11.09	--	3.88	77

Tracking (1Yr) vs Index

Excess Return	N.A.
Beta	N.A.
Alpha	N.A.
Correlation	N.A.
Treynor	N.A.
R-Squared	N.A.
Information Ratio	N.A.
Tracking Error	N.A.

6) Dividend | DVD »

Per	Curr	Income	Cap. Gain
YTD	USD	.00	.00
2025	USD	.3708	.00
2024	USD	1.1408	.00
2023	USD	2.7426	.00
2022	USD	1.3189	.4933
2021	USD	.00	.00

Absolute (1Yr)	Fund	Index	Peers
Sharpe Ratio	3.26	--	.75
Volatility	9.11	--	11.50
Sortino Ratio	2.70	--	.69
Downside Risk	7.34	--	8.50

5) Peer Group | FSRC »

1 Yr	Rtn %	Vol %
Average	12.95	11.50
Std Deviation	10.53	4.42
Median	9.92	10.51

Dividend Statistics

12 Month Yield	1.75%
Net Indicated Yield	1.75%
1 Yr Dividend Growth	-67.50%
3 Yr Dividend Growth	-41.08%
5 Yr Dividend Growth	20.26%
Dividend Frequency	Annual

Source: Bloomberg

MINOR LEAGUE

AAA Farm Team

CP Investment Committee's Research and Development

Chicago Partners | Wealth Advisors

QCFIX

QCFIX US Equity | Settings | Comparative Returns

Range 06/17/2025 - 01/07/2026 Period Daily No. of Period 204 Day(s) Table

	Security	Currency	Price Change	Total Return	Difference	Annual Eq
1)	QCFIX US Equity	USD	13.80%	22.95%	6.54%	44.72%
2)	SPY US Equity	USD	15.41%	16.41%	--	31.23%
3)						
4)						
5)						
6)						

1M 3M 6M YTD 1Y 2Y 3Y 5Y 10Y

Source: Bloomberg

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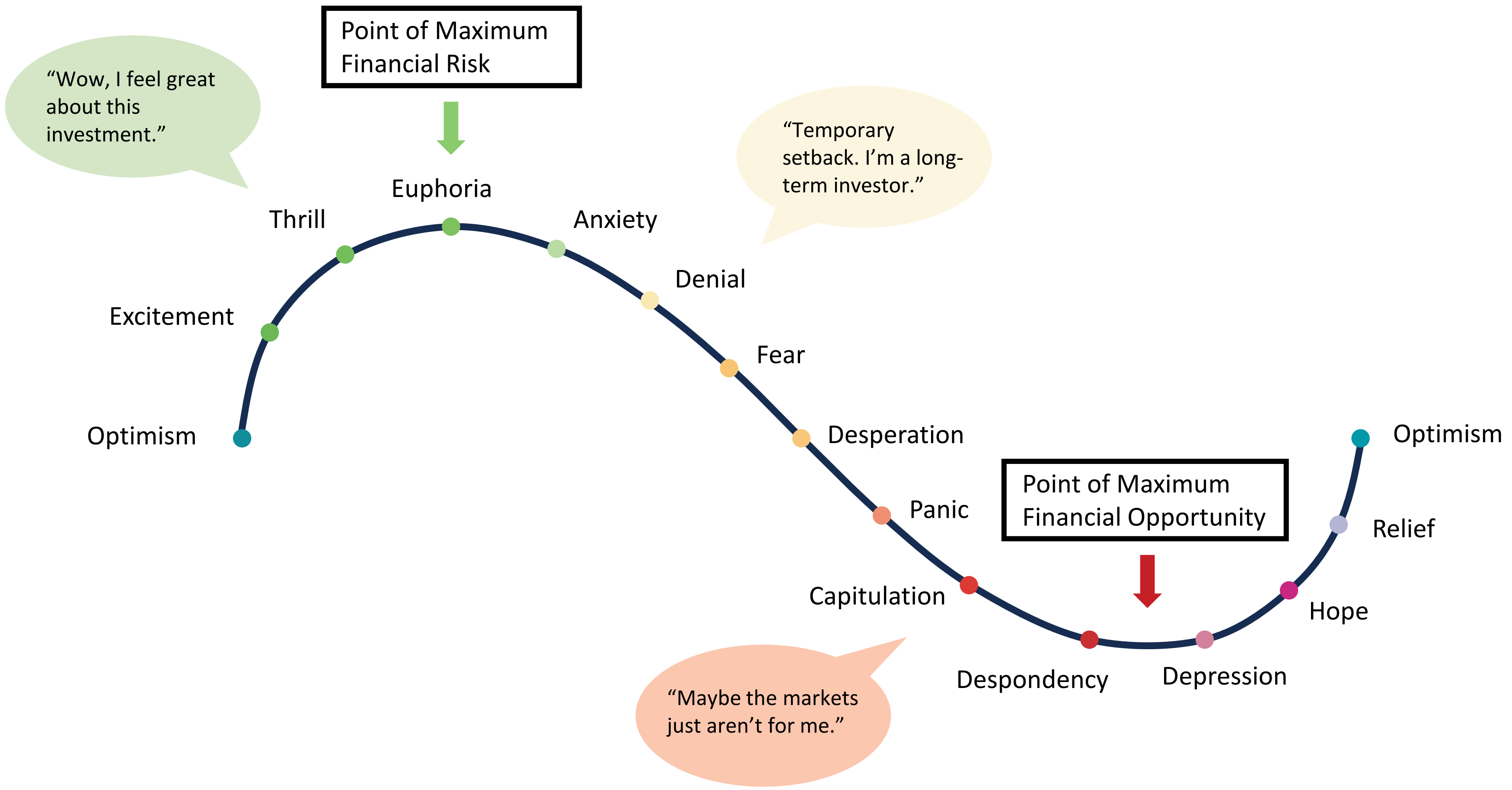
Client Experience
Investor Psychology & Important Reminders

The 14 Stages of Trading Psychology



Anthony Halpin
Founder & CFO

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The 14 Stages of Trading Psychology

1. OPTIMISM – It all starts with a hunch or a positive outlook leading us to buy a stock.

2. EXCITEMENT – Things start moving our way and we get giddy inside. We start to anticipate and hope that a possible success story is in the making.

3. THRILL – The market continues to be favorable and we just can't help but start to feel a little "smart." At this point we have complete confidence in our trading system.

4. EUPHORIA – This marks the point of maximum financial risk but also maximum financial gain. Our investments turn into quick and easy profits, so we begin to ignore the basic concept of risk. We now start trading anything that we can get our hands on to make a buck.

5. ANXIETY – Oh no, it's turning around! The markets start to show their first signs of taking your "hard earned" gains back. But having never seen this happen, we still remain ultra greedy and think the long-term trend is higher.

6. DENIAL – The markets don't turn as quickly as we had hoped. There must be something wrong we think to ourselves. Our "long-term" view now shortens to a near-term hope of an improvement.

7. FEAR – Reality sets in that we are not as smart as we once thought. Instead of being confident in our trading we become confused. At this point we should get out with a small profit and move on but we don't for some stupid reason.

8. DESPERATION – All gains have been lost at this point. We had our chance to profit and missed it. Not knowing how to act, we attempt to do anything that will bring our positions back into the black.

9. PANIC – The most emotional period by far. We are clueless and helpless. At this stage we feel like we are at the mercy of the market and have absolutely no control.

10. CAPITULATION – We have reached our breaking point and sell our positions at any price. So long as we can get out of the market to avoid bigger losses we are content.

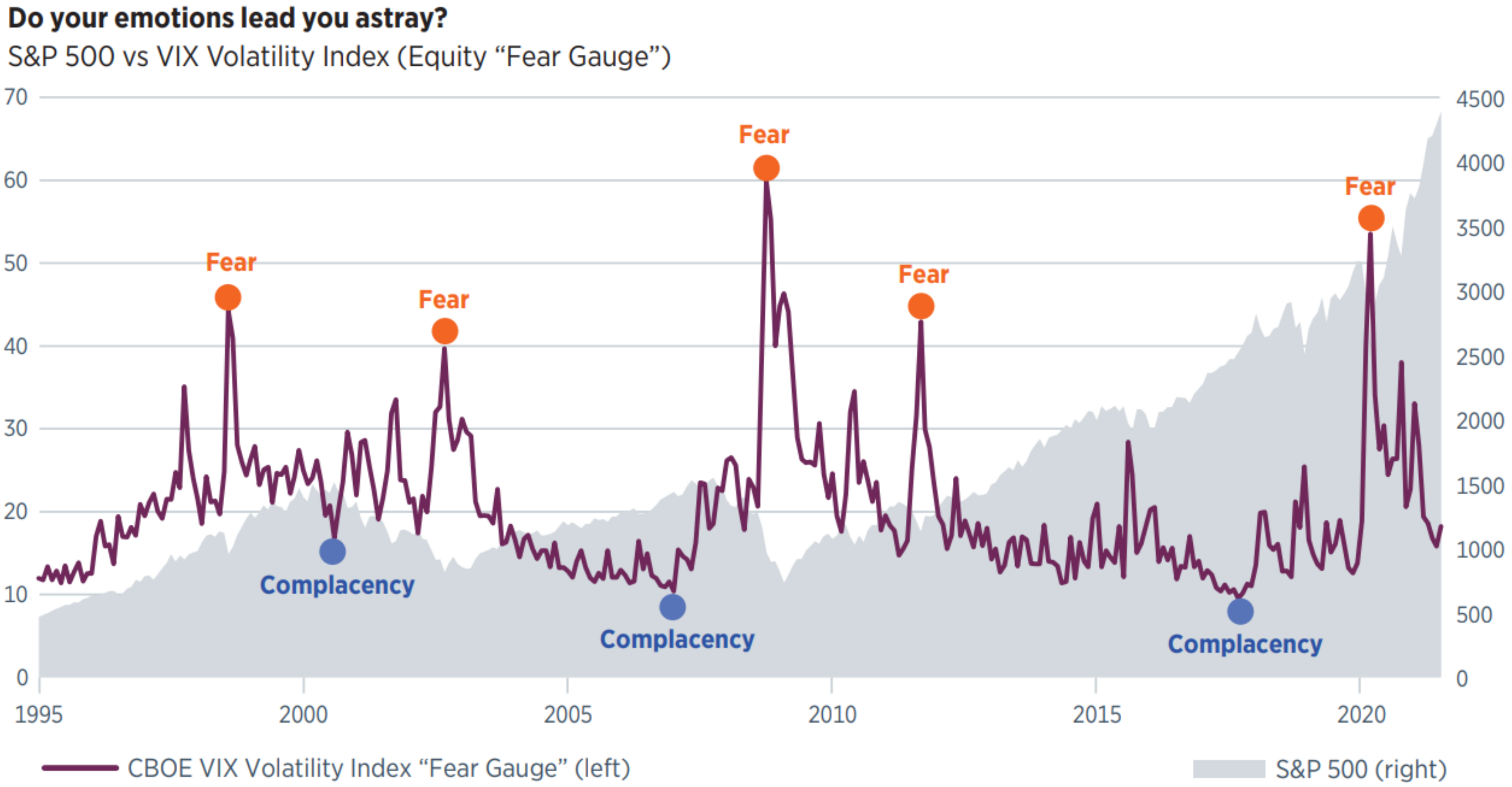
11. DESPONDENCY – After exiting the markets we do not want to buy stocks ever again. The markets are not for us and should be avoided like the plague. However, this rare point marks the point of maximum financial opportunity.

12. DEPRESSION – We drink, cry and/or pray. How could we have been so dumb we think to ourselves. Some start to correctly look back and analyze what went wrong. Real traders are born here, learning from past mistakes.

13. HOPE – We can still do this! Eventually we come to the realization that the market actually does have cycles (shocking). We begin to start analyzing new opportunities.

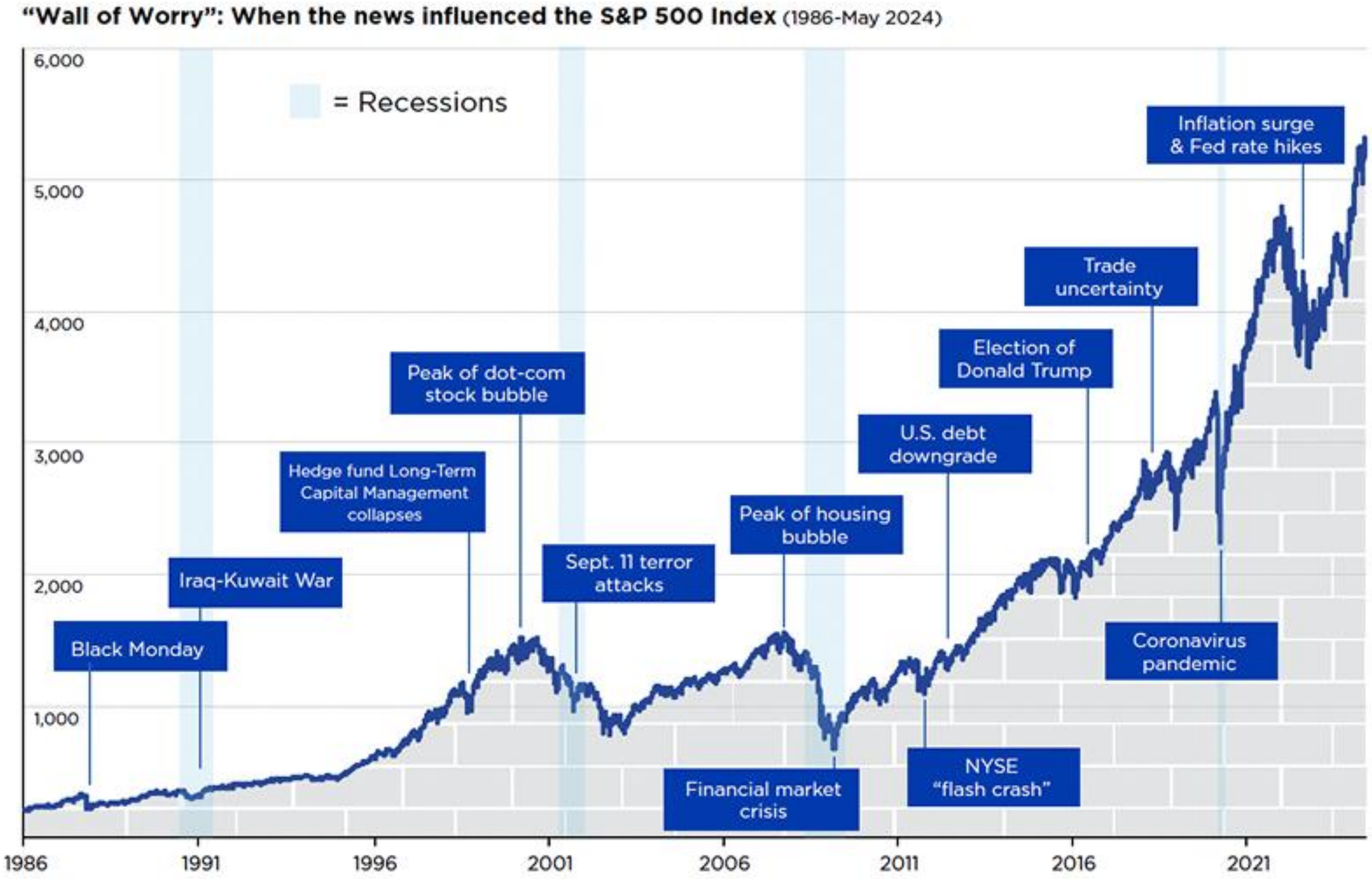
14. RELIEF – The markets are turning positive again and we see our prior investment come back around. We regain our faith (although small) in our ability to invest our money. The cycle start all over again!

S&P 500 vs VIX Volatility Index "Fear Gauge"



Source: Macrobond, Wilmington Trust

The “Wall of Worry”



Source: Factset, Nationwide

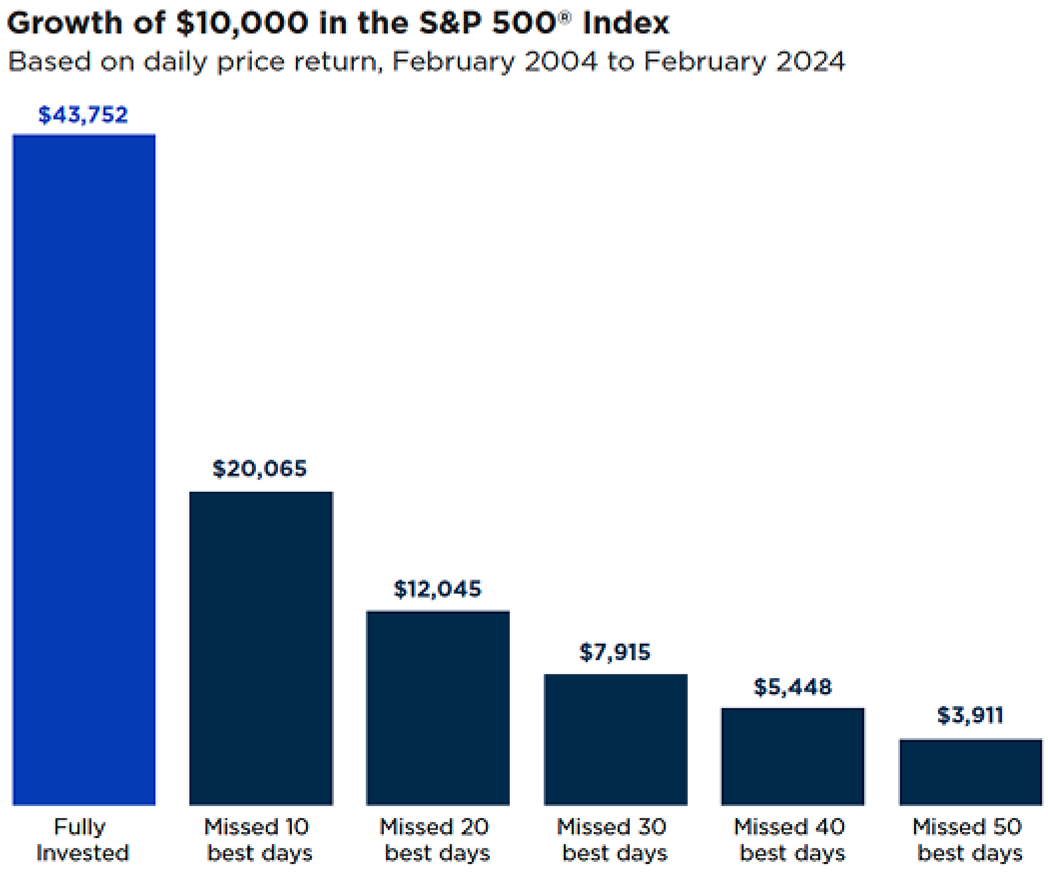
Anthony Halpin
Founder & CFO

The Biggest Mistakes When Investing Money

Source: Findependent

Anthony Halpin
Founder & CFO

The Impact of Missing Key Market Days



Source: Factset Data Systems, Nationwide

Anthony Halpin
Founder & CFO

Cost Basis and Performance

	Symbol	Name ▲	Acquired/ Opened	Quantity	Market Value ⓘ	Cost Basis ⓘ	Cost per Share ⓘ	($) Unrealized Gain/...	(%) Unrealized Gai...	Holding Period
›	BX	BLACKSTONE INC	View Lots	484.50770	$78,771.26	$61,664.64	$127.2728	$17,106.62	27.74%	
›	BN	BROOKFIELD CORP FCLAS...	View Lots	1,702.00000	$83,772.44	$30,067.05	$17.6657	$53,705.39	178.62%	
›	CPEFX	CASCADE PRIVATE CAPITAL I	View Lots	4,299.94800	$87,159.95	$82,000.00	$19.0700	$5,159.95	6.29%	
⌄	CCLFX	CLIFFWATER CORPORATE ...	Hide Lots	18,233.24800	$190,537.44	$193,105.77	$10.5909	($2,568.33)	(1.33%)	
			12/13/2022	7,994.82600	$83,545.93	$85,000.00	$10.6319	($1,454.07)	(1.71%)	Long Term
			12/29/2022	183.75800	$1,920.27	$1,914.76	$10.4200	$5.51	0.29%	Long Term
			04/04/2023	209.21800	$2,186.33	$2,177.96	$10.4100	$8.37	0.38%	Long Term
			07/05/2023	236.89300	$2,475.53	$2,480.27	$10.4700	($4.74)	(0.19%)	Long Term
			07/28/2023	5,680.39800	$59,360.16	$60,000.00	$10.5626	($639.84)	(1.07%)	Long Term
			10/03/2023	402.63700	$4,207.56	$4,235.74	$10.5200	($28.18)	(0.67%)	Long Term
			12/28/2023	414.85900	$4,335.28	$4,372.61	$10.5400	($37.33)	(0.85%)	Long Term
			03/28/2024	426.72900	$4,459.32	$4,501.99	$10.5500	($42.67)	(0.95%)	Long Term
			07/02/2024	438.00900	$4,577.19	$4,664.80	$10.6500	($87.61)	(1.88%)	Long Term
			10/02/2024	449.26800	$4,694.85	$4,780.21	$10.6400	($85.36)	(1.79%)	Long Term
			12/27/2024	464.28400	$4,851.77	$4,926.05	$10.6100	($74.28)	(1.51%)	Long Term
			04/02/2025	433.31500	$4,528.14	$4,580.14	$10.5700	($52.00)	(1.14%)	279 days
			07/02/2025	443.69600	$4,636.62	$4,685.43	$10.5600	($48.81)	(1.04%)	188 days
			10/02/2025	455.35800	$4,758.49	$4,785.81	$10.5100	($27.32)	(0.57%)	96 days

NAME ↑	MARKET VALUE	PERIOD	MTD	QTD	YTD	1 YEAR	3 YEAR
⌄ **Strategic Income**	**$527,971.44**	**0.10%**	**0.10%**	**0.10%**	**0.10%**	**8.10%**	**9.44%**
Bloomberg US Agg Bond		*0.01%*	*0.01%*	*0.01%*	*0.01%*	*7.45%*	*4.39%*
Cliffwater Corporate Lending I	$190,537.44	0.10%	0.10%	0.10%	0.10%	8.92%	11.36%

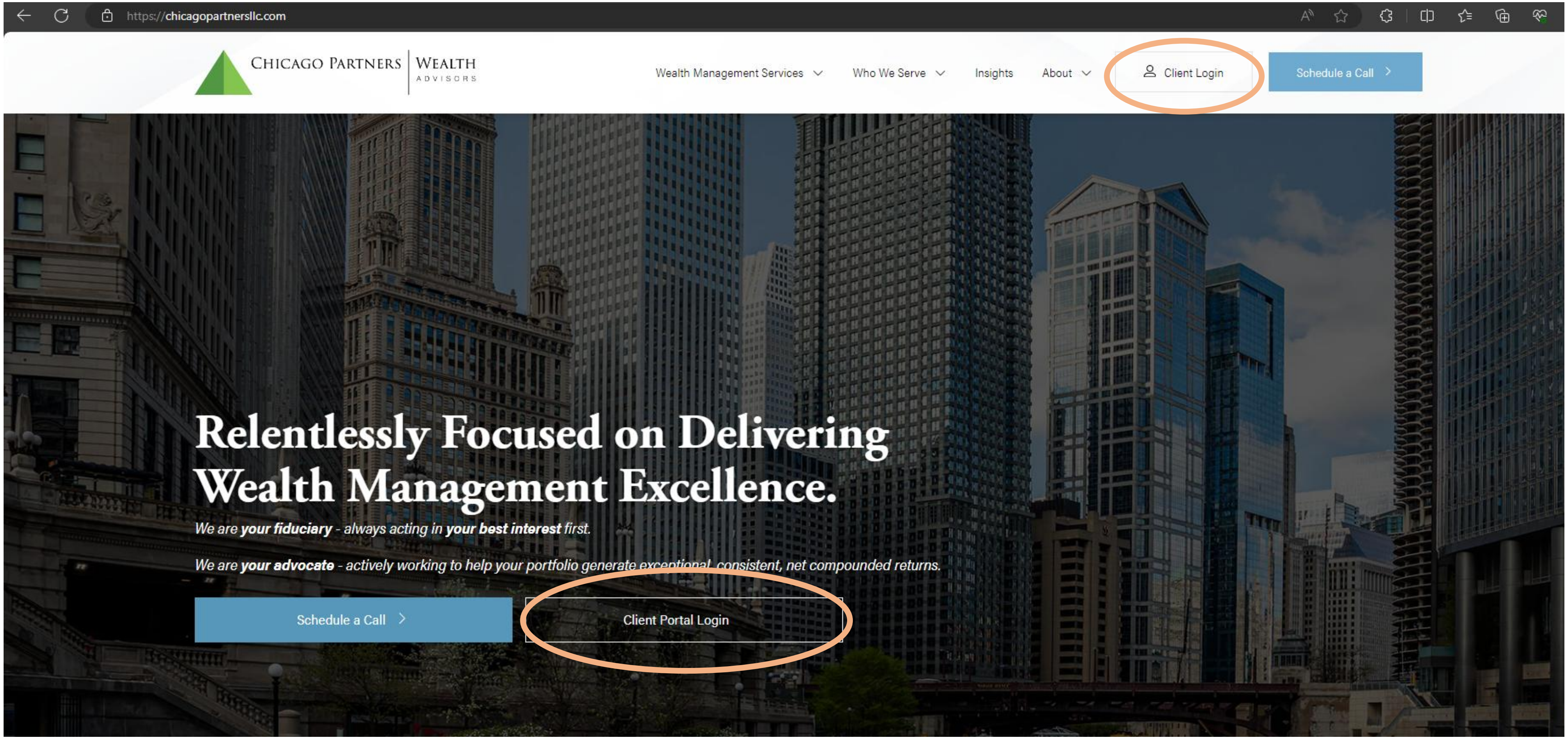
Source: Chicago Partners

CP Legacy Foundation

- IRS Approved 501c3 Private Foundation
- Ultimate Flexibility for Estate Assets Designated for Charity
- Annual Minimum Payout of 5%
- Available to Add as a Beneficiary to IRA Accounts, Trust Accounts, or Current DAF Accounts
- Ability to Create Customized Giving Plan with Chicago Partners

Client Access
Client Portals & Login Information

Client Access



Custodian Login

Custodian Login

Chicago Partners works with **Charles Schwab and Fidelity**.

These institutions serve as custodians for your money and allow Chicago Partners to manage the funds without ever taking custody of your accounts.

charles SCHWAB

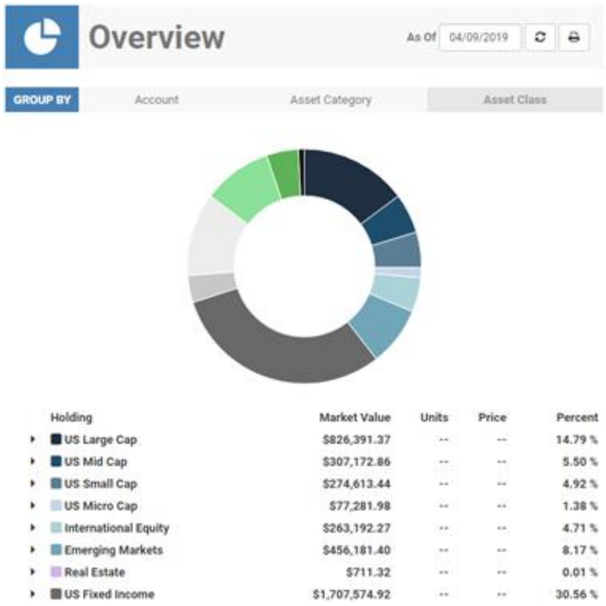
Log into Charles Schwab >

Fidelity

Log into Fidelity >

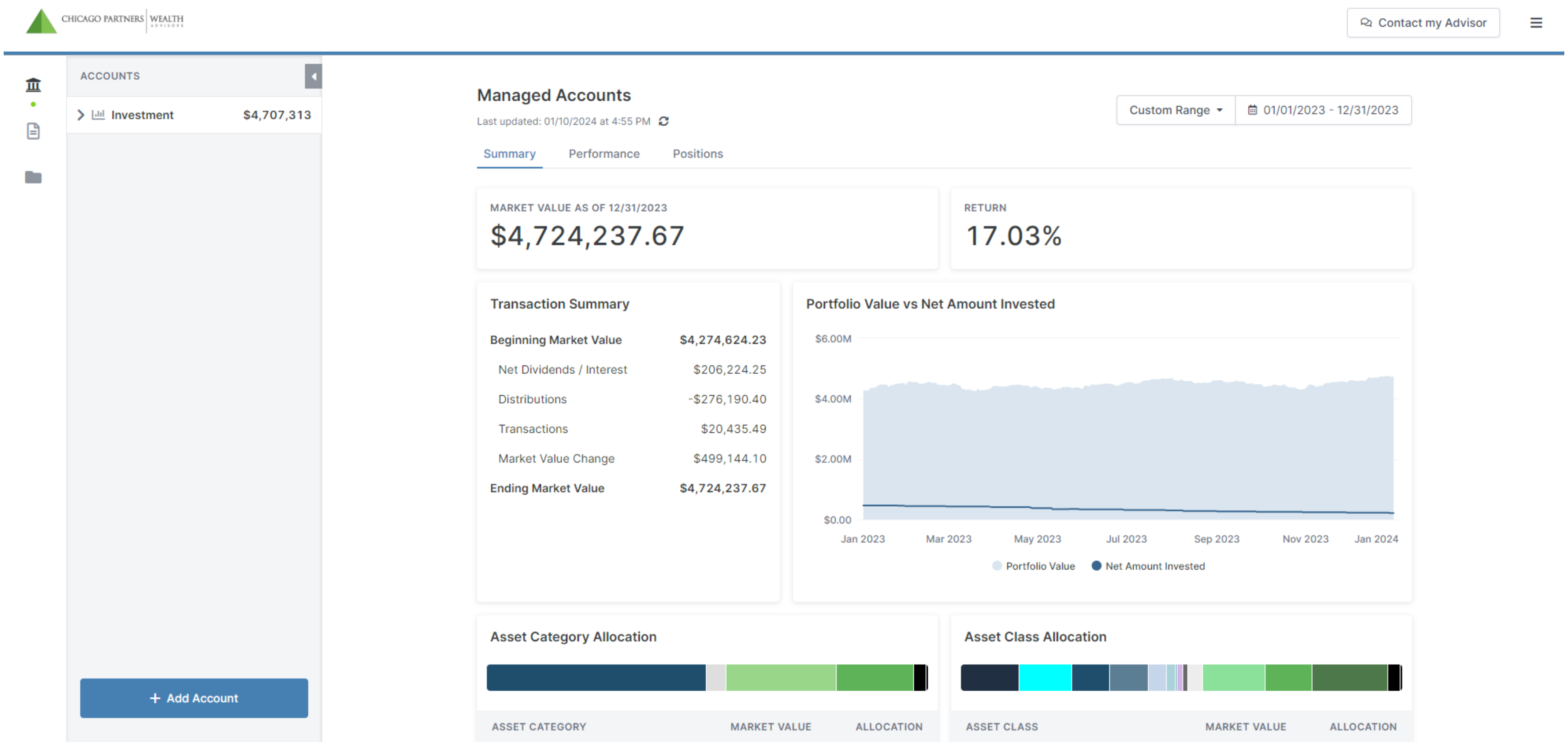
Nicole Polanco, CFP®
Senior Wealth Advisor

The Chicago Partners Client Portal & Mobile App



- **Connect to your portal from anywhere** - your desktop, laptop, or your mobile phone.
- Enhanced Performance Reporting
- **Access your reports and account statements** digitally in one location

The Chicago Partners Client Portal & Mobile App



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Senior Wealth Advisor

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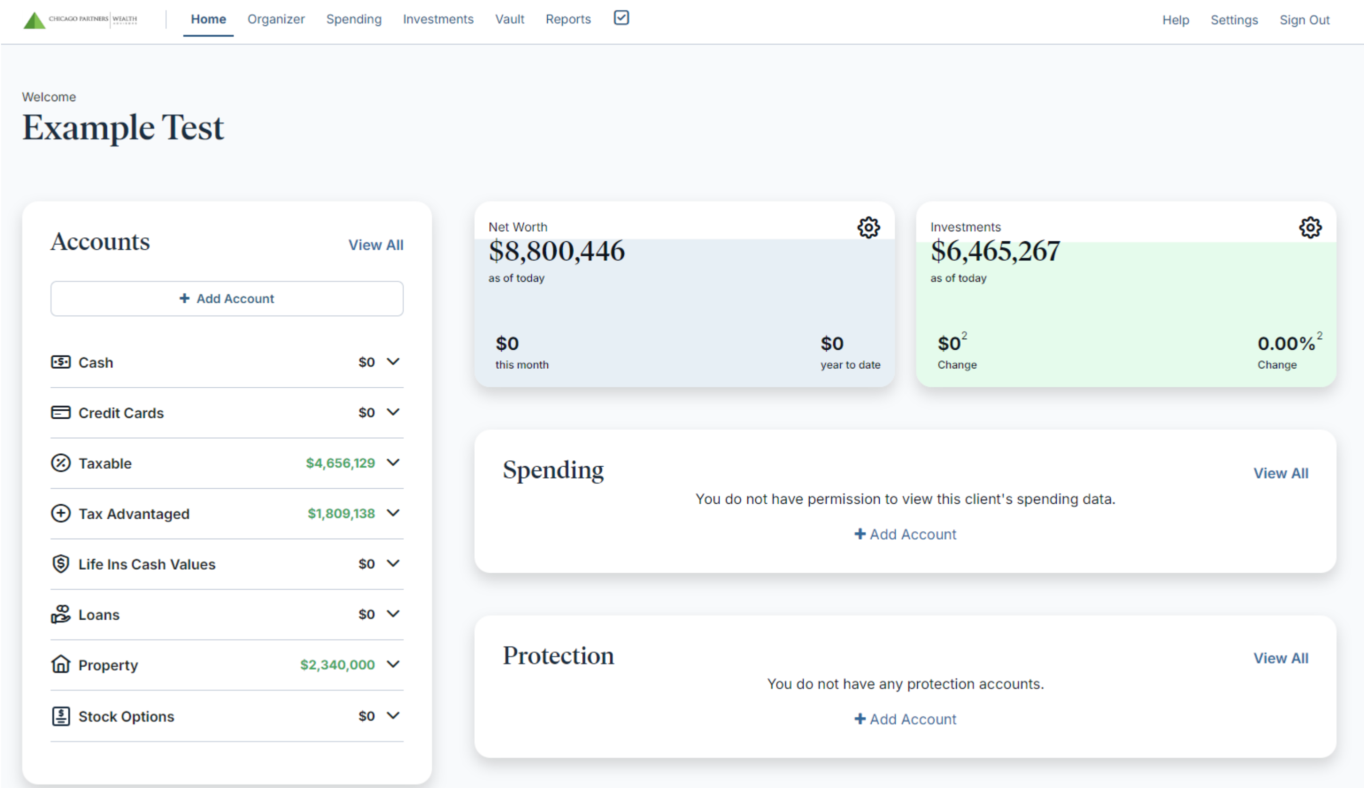
Wealth Management System (WMS)



- Your WMS account provides a **global overview** of your balance sheet.
- Planning for Success
- Common **Scenario Analysis**
  - Large Purchases
  - “What if?”
  - Annual Expense Review

Upcoming Young Investors Webinar

Is there a young professional or young investor you know that could use some help getting their finances together and developing financial literacy skills?

Our Wealth Advisors have started a webinar series aimed to prepare young investors for a lifetime of financial success. The details are below:

When: Wednesday, January 28th at 12:00pm CT
Where: Zoom
Who: Young Investors (Ages 18 – 29)

Tell the young professionals you know to keep their eye out for the next edition of our Young Investors Webinar! Please feel free to reach out to your advisor if you would like to subscribe to the Young Investors Webinar Series or have any specific questions.

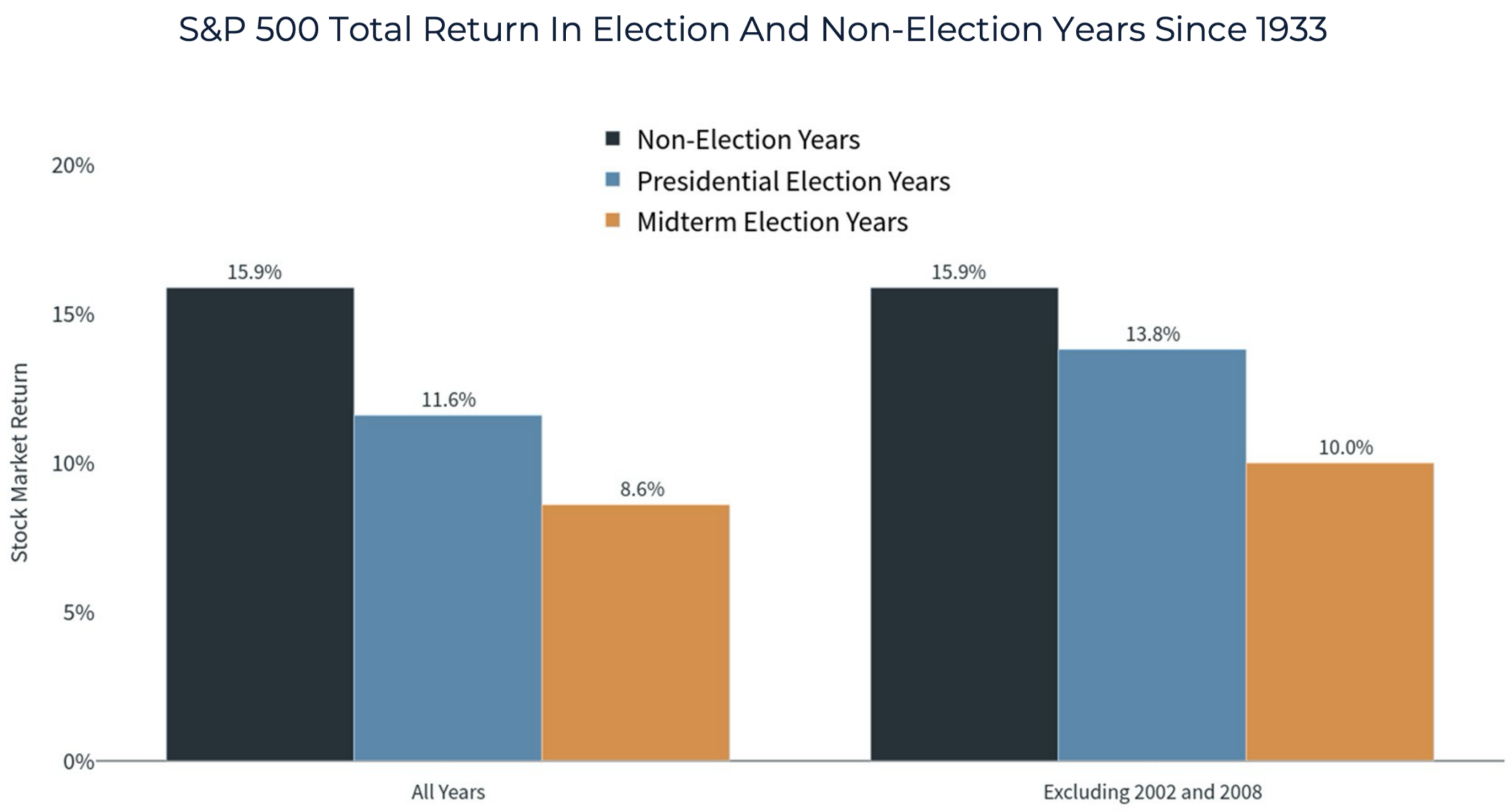
If you have previously subscribed to the series, you will automatically receive an invitation and replay of this next installment.

Nicole Polanco, CFP®
Senior Wealth Advisor

Q&A

Thank you for attending!

Stock Markets in Election Years



Source: Kitces

Important Disclosure Information

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Historical performance results for investment indices, benchmarks, and/or categories have been provided for general informational/comparison purposes only, and generally do not reflect the deduction of transaction and/or custodial charges, the deduction of an investment management fee, nor the impact of taxes, the incurrence of which would have the effect of decreasing historical performance results. It should not be assumed that your CP account holdings correspond directly to any comparative indices or categories. **Please Also Note**: (1) comparative benchmarks/indices may be more or less volatile than your CP accounts; and, (2) a description of each comparative benchmark/index is available upon request.

*Please Note: Ranking Limitations. Neither rankings nor recognitions by unaffiliated rating services, publications, media, or other organizations, nor the achievement of any professional designation, certification, degree, or license, membership in any professional organization, or any amount of prior experience or success, should be construed by a client or prospective client as a guarantee that the client will experience a certain level of results if the investment professional or the investment professional's firm is engaged, or continues to be engaged, to provide investment advisory services. A fee was not paid by either the investment professional or the investment professional's firm to receive the ranking. The ranking is based upon specific criteria and methodology (see ranking criteria/methodology). No ranking or recognition should be construed as an endorsement by any past or current client of the investment professional or the investment professional's firm. ANY QUESTIONS: CP's Chief Compliance Officer remains available to address any questions regarding rankings and/or recognitions, including the criteria used for any reflected ranking.