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Evercore Wealth Management Promotes Michael Kirkbride, Aldo Palles and Ross Saia to Partner

NEW YORK, March 2, 2023 – Evercore Wealth Management today announced the promotions of Portfolio Manager Michael Kirkbride, Portfolio Manager Aldo Palles, and Wealth and Fiduciary Advisor Ross Saia to partner. Mr. Kirkbride is based at the Evercore headquarters in New York City; Mr. Palles and Mr. Saia are based at the Evercore Wealth Management and Evercore Trust Company, N.A. office in Palm Beach, Florida.

"Michael, Aldo and Ross are strong contributors to our firm, always putting our clients first and demonstrating terrific teamwork," said Chris Zander, CEO of Evercore Wealth Management and Evercore Trust Company, N.A. "I am delighted to recognize their leadership and look forward to working with them as we continue to grow our business across the United States, advising our clients at the highest professional level."

Mr. Kirkbride is a portfolio manager at Evercore Wealth Management, managing investment assets for families, foundations, and endowments. He contributes to managing the firm's core equity strategy and dividend-yield portfolio and to the continuing development of the firm's ESG investment approach, which is customized for each client. Mr. Kirkbride joined Evercore in 2019 from Fieldpoint Private, where he worked for two years as a senior investment advisor. He previously worked as a senior portfolio manager at U.S. Trust, managing approximately $2 billion in assets for families and foundations. He received a B.A. at Rutgers College and an MBA from the New York University Stern School of Business.

Mr. Palles is a portfolio manager at Evercore Wealth Management, managing investment assets for families, foundations and endowments. He is an active member in the firm's national investment committee. Mr. Palles joined Evercore in 2018 from U.S. Trust, Bank of America Private Wealth Management, where he served as a managing director and senior portfolio manager in Palm Beach. Earlier, he served as the chief investment officer of Crestmark Investment Management in Jupiter, Florida, and worked as a financial advisor at GenSpring Family Offices in Palm Beach Gardens. He has a bachelor's in business administration and finance from Florida International University, a master's in accountancy from the University of Denver and a master's in finance from the University of Miami. He holds the Chartered Financial Analyst, Chartered Alternative Investment Analyst, Certified Financial Planner® and Certified Trust and Fiduciary Advisor designations.

Mr. Saia is a wealth & fiduciary advisor at Evercore Wealth Management and Evercore Trust Company, delivering strategic planning and fiduciary advice to high-net-worth and ultra-high-net-worth families and contributing to the Fiduciary Oversight Group. He joined Evercore in 2018 from U.S. Trust, Bank of America Private Wealth Management, where he served as a senior vice president and senior trust officer in Palm Beach. He previously oversaw fiduciary and investment administration at the Palm Beach office of Brown Brothers Harriman & Co. Mr. Saia has a B.S. in business management from the City University of New York. He holds the Certified Financial Planner® and Certified Trust and Fiduciary Advisor designations. He is also a member of the East Coast Estate Planning Council and Palm Beach County Estate Planning Council.

About Evercore

Evercore (NYSE: EVR) is a premier global independent investment banking advisory firm. We are dedicated to helping our clients achieve superior results through trusted independent and innovative advice on matters of strategic significance to boards of directors, management teams and shareholders, including mergers and acquisitions, strategic shareholder advisory, restructurings and capital structure. Evercore also assists clients in raising public and private capital and delivers equity research and equity sales and agency trading execution, in addition to providing wealth and investment management services to high-net-worth and institutional investors. Founded in 1995, the firm is headquartered in New York and maintains offices and affiliate offices in major financial centers in North America, Europe, South America, the Middle East and Asia. For more information, please visit www.evercore.com.

About Evercore Wealth Management

Evercore Wealth Management, LLC, a subsidiary of Evercore, serves high net worth families, foundations, and endowments, delivering customized strategic wealth planning, investment management, and trust and custody services. Evercore Wealth Management is a registered investment advisor with the U.S. Securities and Exchange Commission (the "SEC"), with offices in New York, Minneapolis, Palm Beach, San Francisco, and Tampa. Registration with the SEC does not imply a certain level of skill or training. The firm manages $10.5 billion in client assets as of December 31, 2022. Additionally, Evercore Wealth Management offers personal trust and custody services to its clients through its Wilmington, Delaware-based affiliate Evercore Trust Company, N.A. a national trust bank regulated by the Office of the Comptroller of the Currency. More information about planning, investing and personal fiduciary services at Evercore Wealth Management can be found at www.evercorewealthandtrust.com.

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