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Wire Transfer

Page 1 of 4

Investment Advisor ("IA") Information (This portion to be completed by IA.)

SILVERCREST ASSET MANAGEMENT GROUP

IA Firm Name (Please print.)

0800-4615

NY PREMIER METRO

IA Master Account Number

Service Team

BART A. JOHNSTON

(212) 649 0644

BJOHNSTON@SILVERCRESTGROUP.COM

IA Contact Name (if follow-up is required)

IA Telephone Number

IA Email Address

Use This Form To:

Request a wire transfer from your Schwab brokerage account to another financial institution. Certain wires to accounts at foreign institutions may be subject to Federal Reserve Board Regulation E, which requires the disclosure of transaction-related fees, taxes, the exchange rate, the availability date, and other information to consumers. Foreign wires subject to Regulation E may be canceled within 30 minutes of payment. By signing Section 4, you authorize your IA to receive wire disclosures on your behalf and (when applicable) to exercise your right to cancel a wire. If, however, you want to receive Regulation E disclosures and exercise your right to cancel wires yourself, please contact Schwab Alliance at 1-800-515-2157. Please note that in either case you will receive a receipt for the transaction by mail.

- If there are more than two wire instructions, please complete and attach copies of Sections 2 and/or 3.
- Please contact your IA for the appropriate distribution form if requesting a wire from one of the following account types: 529 Plan, Education Savings, IRA, 403(b)(7), Individual 401(k), Qualified Retirement Plan (QRP) accounts, Schwab Bank Investor Checking™, Schwab Bank Investor Savings™, and Schwab Bank Pledged Asset accounts.
- Note: This form may only be used to establish a standing instruction on an IRA or Education Savings if a Tax Withholding Election (TWE) has been completed. If no TWE has been completed, you may only establish a new Wire standing instruction through the IRA Distribution Form or ESA Distribution Form.
- Account holders with Conservatorship or Guardianship accounts are not eligible to set up standing authorizations for their IAs.
- Important Note: If the wire transfer distribution amount exceeds the available cash and the account includes a margin feature, a margin debit will be created or increased as a result of the wire transfer request.
- You may wire transfer cash out of a Custodial account **only** for the benefit of the minor. Wires out of Custodial accounts are not permitted to accounts with the following registrations: Trust, LLC, Partnership, Custodial IRA, and Individual IRA, even if the distribution is for the benefit of the minor or is reimbursement of payments made for the minor's benefit.
- Contributions to your Schwab Charitable donor-advised fund account (Account) must be for a minimum of \$500.

For faster processing and approval of money movement requests, ask your Advisor about eAuthorization.

1. Schwab Account Information

8149-0186

JOHN J SLOCUM CUSTODIAN FOR E BECKWITH- SMITH

Schwab Account Number

Trust/Organization Name

JOHN

J.

SLOCUM

Account Holder/Trustee Name First

Middle

Last

Additional Account Holder/Co-Trustee Name First

Middle

Last

Additional Account Holder/Co-Trustee Name First

Middle

Last

2. Domestic Wires

This includes wires sent to the United States, Guam, Puerto Rico, the U.S. Virgin Islands, American Samoa, and the Northern Mariana Islands. To avoid delay, please contact receiving financial institution for accurate routing instructions.

- ☐ One-Time Wire
- ☐ Standing Wire Instructions

I have authorized my IA and any individual granted Full Trading Authority ("FTA") or Full Power of Attorney ("FPOA") on this account to direct wire transfers on an ongoing basis, in any amount as they direct, from my account to the receiving account designated below. This authority does not include designating or changing the receiving account identified below. I authorize Schwab to accept and act upon any future instructions from me, my FTA, my FPOA, or my IA to wire funds, in any amount as we may direct, to the receiving account designated below. I understand I may revoke this instruction by notifying Schwab. I acknowledge that I may receive notices from Schwab about these standing instructions from time to time. (Select one.)

- ☐ Implement new instructions
- ☐ Terminate existing instructions

Amount to Be Wired (optional)	ABA Transit Routing Number of Receiving Bank (9-digit number; please verify with bank.)	Receiving Bank Name
Account Number at Receiving Bank	Name(s) on Receiving Bank Account (registration)	
Address of Account Holder at Receiving Bank, if different from Schwab Account Registration (e.g., beneficiary address or address of escrow company/brokerage firm/credit union, if for further credit)		
For Further Credit Account Number (if applicable) (e.g., escrow account number)	Name of Final Beneficiary (required, if for further credit)	

Address of Final Beneficiary (required for further credit and if Final Beneficiary is different from Schwab account registration. **Note: The Address of Final Beneficiary cannot be the address of the bank.**)

- ☐ One-Time Wire
- ☐ Standing Wire Instructions

I have authorized my IA and any individual granted Full Trading Authority ("FTA") or Full Power of Attorney ("FPOA") on this account to direct wire transfers on an ongoing basis, in any amount as they direct, from my account to the receiving account designated below. This authority does not include designating or changing the receiving account identified below. I authorize Schwab to accept and act upon any future instructions from me, my FTA, my FPOA, or my IA to wire funds, in any amount as we may direct, to the receiving account designated below. I understand I may revoke this instruction by notifying Schwab. I acknowledge that I may receive notices from Schwab about these standing instructions from time to time. (Select one.)

- ☐ Implement new instructions
- ☐ Terminate existing instructions

Amount to Be Wired (optional)	ABA Transit Routing Number of Receiving Bank (9-digit number; please verify with bank.)	Receiving Bank Name
Account Number at Receiving Bank	Name(s) on Receiving Bank Account (registration)	
Address of Account Holder at Receiving Bank, if different from Schwab Account Registration (e.g., beneficiary address or address of escrow company/brokerage firm/credit union, if for further credit)		
For Further Credit Account Number (if applicable) (e.g., escrow account number)	Name of Final Beneficiary (required, if for further credit)	

Address of Final Beneficiary (required for further credit and if Final Beneficiary is different from Schwab account registration. **Note: The Address of Final Beneficiary cannot be the address of the bank.**)

3. Foreign Wires

If requesting a wire in a foreign currency, check with your service team for eligible foreign currency types. To avoid delay, please contact receiving financial institution for accurate routing instructions.

- ☐ One-Time Wire
- ☒ Standing Wire Instructions

I have authorized my IA and any individual granted Full Trading Authority ("FTA") or Full Power of Attorney ("FPOA") on this account to direct wire transfers on an ongoing basis, in any amount as they direct, from my account to the receiving account designated below. This authority does not include designating or changing the receiving account identified below. I authorize Schwab to accept and act upon any future instructions from me, my FTA, my FPOA, or my IA to wire funds, in any amount as we may direct, to the receiving account designated below. I understand I may revoke this instruction by notifying Schwab. I acknowledge that I may receive notices from Schwab about these standing instructions from time to time. (Select one.)

- ☒ Implement new instructions
- ☐ Terminate existing instructions

Confirm wire amount using one of the following options:

- ☐ Fixed USD
- ☒ Fixed Foreign Exchange Amount
- ☐ Fixed USD Converted to Foreign Exchange

£ GBP

Currency

Amount to Be Wired (Indicate amount in either US\$ or foreign currency.)

NatWest

Yes

BIC - NWBKGB2L

Receiving Bank Name

Is beneficiary account in local currency?

SWIFT Code of Receiving Bank

IBAN : GB07 NWBK 6006 1930 6247 03 // SORT CODE: 600619

If non-U.S.-dollar wire, IBAN is required for euro wires to Europe; Sort Code is required for wires to the U.K.; CLABE is required for Mexican peso wires to Mexico (if applicable).

Wires to Australia, New Zealand, Canada, or the U.K., use local routing number (e.g., BLZ, BSB, Transit Code, Sort Code).

30624703

250 Bishopsgate, London, EC2M 4AA

Account Number at Receiving Bank

Receiving Bank Address (required for non-U.S. institutions)

BECKWITH-SMITH EMS

Name(s) on Receiving Bank Account (registration)

3 Woodside Road, New MaldenKt3 3Ah UK

Address of Account Holder at Receiving Bank, if different from Schwab account registration (e.g., beneficiary address or address of escrow company/brokerage firm/credit union, if for further credit)

For Further Credit Account Number (if applicable) (e.g., escrow account number)

Escrow Company Phone Number (if applicable) (Country Code) (City Code)

Final Beneficiary Account Number (if applicable)

Relationship to Final Beneficiary (if applicable)

Name of Final Beneficiary (required, if for further credit)

Wire Reference (if applicable)

Address of Final Beneficiary (required for further credit and if Final Beneficiary is different from Schwab account registration. Note: The Address of Final Beneficiary cannot be the address of the bank.)

4. Please Read, Sign and Date

I authorize Charles Schwab & Co., Inc. ("Schwab") to wire funds from my Schwab account pursuant to the preceding instructions. I understand that wiring funds outside of the U.S. may take up to seven business days.

We may wire funds from your Schwab account based on the information you provide above. Please note: Accuracy is important. If you describe any beneficiary or financial institution by name and account or identifying number, we and other institutions may process the wire based solely on the number, even if it identifies a different person or entity. If you provide an incorrect account number, you could lose the amount transferred. We may refuse to act upon any instruction that we cannot verify as accurate and authorized by you.

For Custodial Accounts: I acknowledge that, subject to applicable law, these funds will be used for the sole benefit of the minor listed on the

Certificate Of Completion

Envelope Id: 33D167C76191489DB128766C8CA8174D

Status: Completed

Subject: Please DocuSign: Silvercrest

Source Envelope:

Document Pages: 5

Signatures: 1

Envelope Originator:

Certificate Pages: 8

Initials: 0

Michael Doyle

AutoNav: Enabled

211 Main Street

Enveloped Stamping: Enabled

San Francisco, CA 94105

Time Zone: (UTC-05:00) Eastern Time (US & Canada)

mdoyle@silvercrestgroup.com

IP Address: 69.8.122.81

Record Tracking

Status: Original

Holder: Michael Doyle

Location: DocuSign

6/23/2023 3:22:53 PM

mdoyle@silvercrestgroup.com

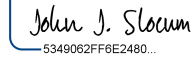
Signer Events

John J. Slocum

jjslocum3@gmail.com

Security Level: Email, Account Authentication
(None), Authentication**Signature**

DocuSigned by:


5349062FF6E2480...

Signature Adoption: Pre-selected Style

Using IP Address: 72.215.34.21

Timestamp

Sent: 6/23/2023 3:39:34 PM

Resent: 6/27/2023 12:05:13 PM

Viewed: 6/29/2023 1:20:57 PM

Signed: 6/29/2023 1:21:54 PM

Authentication Details

Passed SMS Authentication for John J. Slocum as a result of successful prior SMS Authentication within the last 2 days. Last Successful SMS Authentication: 6/29/2023 1:19:30 PM EDT on Enveloped: f0747a04-6630-43cc-bbd9-03cc7dad54eb

SMS Auth:

Transaction: 7dff18f2-55da-4327-8f5b-33d477917ccc

Result: passed

Vendor ID: TeleSign

Type: SMSAuth

Performed: 5/10/2024 11:30:42 AM

Phone: +1 407-247-6450

Electronic Record and Signature Disclosure:

Accepted: 6/29/2023 1:20:57 PM

ID: 0c4b7a15-1fa9-42fe-b0d6-c98459952f6d

Company Name: Charles Schwab & Co., Inc.

In Person Signer Events**Signature****Timestamp****Editor Delivery Events****Status****Timestamp****Agent Delivery Events****Status****Timestamp****Intermediary Delivery Events****Status****Timestamp****Certified Delivery Events****Status****Timestamp****Carbon Copy Events****Status****Timestamp**

Schwab Internal

sacdocusignenvelopes@schwab.com

Security Level: Email, Account Authentication
(None)**COPIED**

Sent: 6/23/2023 3:39:33 PM

Electronic Record and Signature Disclosure:

Not Offered via DocuSign

Witness Events**Signature****Timestamp**

Notary Events	Signature	Timestamp
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Envelope Summary Events	Status	Timestamps
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Envelope Sent	Hashed/Encrypted	6/23/2023 3:39:33 PM
Certified Delivered	Security Checked	6/29/2023 1:20:57 PM
Signing Complete	Security Checked	6/29/2023 1:21:54 PM
Completed	Security Checked	6/29/2023 1:21:54 PM

Payment Events	Status	Timestamps
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Electronic Record and Signature Disclosure
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INFORMED CONSENT

INFORMED CONSENT AND AGREEMENT TO USE ELECTRONIC DOCUMENTS AND SIGNATURES

("Consent and Agreement")

Please carefully review this Informed Consent and Agreement to Use Electronic Documents and Signatures. If you consent and agree to electronically receive, review and sign the documents in the envelope subject to the terms below, check the "I agree to use Electronic Records and Signatures" box and then click the "Review Document" button below.

Why We Are Asking for Your Consent

We must ask for and obtain your consent before using electronic documents and signatures in its relationship with you. This is for documents such as investment advisory agreements with us and account agreements and related documents with the Custodian, as described in more detail below. We and the Custodian are each required by law to give you certain information "in writing" – which means you are entitled to receive and review paper documents and, if your signature is required, to sign the paper documents by hand. In order to use an electronic process instead of paper, we and the Custodian need your consent.

Your Consent and Agreement and What it Means

Your Consent is optional. It is solely up to you whether or not to do so. If you want to use electronic documents and signatures, then you must consent and agree to the terms and conditions relating to the system and process that we and the Custodian will use, as set forth below. You will be asked for your consent each time we send you an envelope of electronic documents.

By checking the "I agree to use Electronic Records and Signatures" box and then clicking the "Review Documents" button below, you will be giving your informed consent and agreement to use the electronic documents and signature system and process described below to electronically receive, review, and electronically sign paperless documents sent to you in electronic envelopes. You will be agreeing to be bound by any documents you electronically sign the same as if you had received a paper copy of the document and signed it by hand with an ink pen. If you do not agree to the terms of this Consent and Agreement, do not check the "I agree..." box. Note that even if you agree now, in the future after receiving an electronic document, you will be able to choose whether or not to electronically sign that document or ask for a paper version to sign. You may also withdraw your consent as described below.

To Whom You are Giving Your Consent

This Consent and Agreement is between you and either (a) the independent investment advisory firm whose investment advisory agreement or other Advisor Form (as defined below) is presented for your electronic signature ("*Investment Advisor*") or (b) or the broker-

dealer/custodian whose account application or other Custodian Form (as defined below) is presented for your electronic signature (the “*Custodian*,” depending on whether the documents presented to you are Advisor Forms or Custodian Forms, as defined below. We are independent of and not owned, affiliated with or supervised by the Custodian. If the electronic document presented is an Advisor Form, then this Consent and Agreement is between you and us. If the electronic document presented is a Custodian Form, then this Consent and Agreement is between you and the Custodian. For ease of reference, the terms “*Counterparty*,” “*we*” and “*us*” as used in this Consent and Agreement refer to either Investment Advisor or the Custodian, as applicable, based on whether the electronic document presented is an Advisor Form or a Custodian Form, as defined below.

What Documents You will Receive Electronically

By agreeing to this Consent and Agreement you will receive, review and sign electronically the electronic documents presented in the envelope. These electronic documents may include, but are not limited to:

- Investment Advisor’s documents, such as, but not limited to, Investment Advisor’s investment advisory or similar agreement, and Investment Advisor’s Form ADV or other disclosure brochure (“*Advisor Forms*”).
- Custodian documents, such as, but not limited to, the account application agreement and other documents and forms relating to your account with the Custodian (“*Custodian Forms*”).

We may always, in our sole discretion, provide you with any document on paper, even if you have authorized electronic delivery. Sometimes the law, or our agreement with you, requires you to give us a written notice. You must still provide these notices to us on paper, unless we tell you how to deliver the notice to us electronically.

How you will Receive Electronic Documents

Investment Advisor is your agent who chooses which electronic documents to send you for review and electronic signature. This is the case whether those documents are Advisor Forms or Custodian Forms. Investment Advisor will place electronic documents, which may or may not require your signature, in an electronic envelope on the DocuSign system (as described below), and a link to the envelope will be emailed to you. You will access the envelope and electronic documents, review them, and, if you choose, electronically sign them using the DocuSign system. Investment Advisor, and not the Custodian, is responsible for the content of the electronic documents sent to you. Even if the electronic documents are Custodian Forms, they will be selected and prepared by Investment Advisor and sent to you at the direction and on behalf of Investment Advisor. You acknowledge and agree that if you receive any information or electronic document that is erroneous, not intended for you, or, in the case of Custodian Forms, deemed ineligible for electronic signature by the Custodian upon its receipt, it is solely the responsibility of Investment Advisor and not the Custodian. You agree to immediately notify Investment Advisor if you receive any electronic document or information that appears to be in error or not intended for you.

How Electronically Signed Documents are Processed

You acknowledge and agree to the following regarding your receipt of electronic documents and your use of electronic signatures: If an electronic document requires the signatures of others besides you, it will not be submitted to Counterparty for processing or effective as to its contents or any actions it instructs or authorizes until all required signatures have been obtained. If any party whose signature is required declines to electronically sign, then the electronic signature of any party previously obtained will not be effective, and all parties will be required to hand sign a paper document.

Withdrawing Your Consent

Counterparty will ask you for this Consent and Agreement each time it presents an envelope of electronic documents. Once you give your Consent and Agreement for an envelope, you cannot withdraw it for that envelope. You can, however, choose not to give your consent in the future when you are presented with subsequent envelopes. If you do this, you will be unable to proceed electronically and you may be required to use paper documents and signatures. If you give your Consent and Agreement for an envelope, although you may not withdraw it, you can still choose not to electronically sign any or all electronic documents in that envelope. Once you electronically sign a particular document, you cannot withdraw the Consent and Agreement for that document, but you can choose to not electronically sign any other documents included in the same envelope. In addition, before you complete an electronic signature of a document, you may cancel and exit the electronic signing process before clicking the “Confirm Signing” (or other similarly titled button) and closing your browser.

Retaining Electronic Documents

You should retain a copy of all electronic documents we provide to you, including this Consent and Agreement, for your future reference. You can do this by printing the page on paper or saving it to your computer or mobile device. A copy of this Consent and Agreement, as it may be amended from time to time for consents to be given in the future, will also be available to you at www.docuSign.com.

Getting Paper Documents

If instead of receiving and signing electronic documents, you would rather use paper documents, you should contact Investment Advisor. If you electronically sign a document, you can, in addition to printing a paper copy and/or saving it to your computer, obtain a paper copy from Counterparty by contacting Investment Advisor or the Custodian.

DocuSign System

Investment Advisor has entered into an agreement with DocuSign, Inc. (“*DocuSign*”) to make the DocuSign electronic signing system available to facilitate your receipt, review and electronic signature of electronic documents. Your use of the DocuSign system is subject to DocuSign’s Terms of Use available at www.docuSign.com/company/terms-of-use. Investment Advisor, the

Custodian, and DocuSign are not affiliated with each other. Neither Investment Advisor nor the Custodian is responsible for the DocuSign system, and Investment Advisor and the Custodian each disclaims any representations and all warranties regarding the DocuSign system. Your use of the DocuSign system is entirely your choice and solely your responsibility.

Hardware and Software Requirements

In order to receive electronic documents and electronically sign them, you will need access to a computer or mobile device with internet service and access to an email account. In order to access the electronic documents sent to you, your computer or mobile device must meet certain requirements, the current version of which is shown below. These requirements will change from time to time, and without notice to you, as third-party technology providers update their products. You can visit <https://www.docusign.com/company/terms-of-use/specifications> for the most up to date system requirements. These requirements include: (1) an operating system and internet browser that together support the display of PDF documents; and (2) up-to-date PDF reader software. If you have questions related to the current requirements, please contact Investment Advisor.

The Current Version of software and hardware that meets these requirements is identified below. By "*Current Version*," we mean a version of the software that is currently being supported by its publisher. We reserve the right to discontinue support of a Current Version if, in our sole opinion, it suffers from a security flaw or other flaw that makes it unsuitable for use in the transaction.

Operating Systems:	Windows® XP, Windows Vista®, Windows® 8, Windows® 7, Mac OS® X
Browsers:	Final release versions of Internet Explorer® 7.0 or above (Windows only), Mozilla® Firefox– Current Version (Windows and Mac), Safari™ 6.2 or above (Mac only), Google Chrome® - Current Version
Mobile	Apple iOS 6.0 or above; Android™ 4.0 or above
PDF Reader:	Acrobat® or similar software may be required to view and print PDF files
Screen Resolution:	1024 x 768 minimum
Enabled Security Settings:	Allow per session cookies

Your email notifications are made available in HTML (regular Web hypertext) format, and your electronic documents are made available in PDF format. Your electronic documents may be viewed electronically via the Web and printed with a local printer. You may also save your electronic documents to your local hard drive the way you would any other file from the Internet. Depending upon your comfort level with accessing and storing electronic documents, you should determine whether electronic or paper documents and delivery is best for you. For viewing, printing, storing or downloading your email announcements or the linked web pages, you should use the latest version of your web browser with JavaScript enabled. To access the PDF format for printer-friendly electronic documents, you will also need Adobe Acrobat Reader™. If you do

not have Adobe Acrobat Reader installed on your computer, you can download the necessary software free at any time at www.adobe.com.

If accessing the DocuSign system via a mobile device, please understand that wireless network coverage and Wi-Fi network speed varies by provider and geographic location. Counterparty is not responsible for limitations and/or failures in performance associated with any wireless or Wi-Fi service used to access the DocuSign system or for the security of any wireless or Wi-Fi service (see “Security and Privacy Information,” below).

Updating Your Email Address and Other Contact information

It is your responsibility to provide us with accurate and complete e-mail address and other contact information, and to maintain and update promptly any changes in this information. In addition, Counterparty may periodically ask you to confirm or update your email and any other information needed to contact you electronically. You may update your email address by contacting Investment Advisor.

Security and Privacy Information

In accessing electronic documents and electronically signing them, you should use a computer operating system that has a firewall (software that is designed to prevent unauthorized access to your computer by blocking suspicious people or websites) and that it is turned on and up-to-date. You should also make sure that your computer has anti-virus software that it is turned on and that your subscription is current.

Emails sending you links to envelopes with electronic documents for electronic signature are not encrypted (unless the email expressly says that it is encrypted); but the contents of the envelopes are protected. For security and confidentiality, unencrypted emails will not include your name, full account number, or any other personal identifier. Be aware, however, that some email addresses may use part or all of your name. If you use a work email address, your employer or other employees may have access to your email. Although Counterparty believes that email is a reasonably reliable method of delivery, as with any form of communication, there is a risk of misdelivery or interception.

DocuSign has agreed with Investment Advisor to safeguard the security and privacy of all confidential customer information. DocuSign’s privacy policy applies to your use of the DocuSign system. In addition, Investment Advisor’s privacy policy applies to information we receive from you as part of the electronic signature process. Links or references to where you can view Investment Advisor’s and Custodian’s respective privacy policies may be contained in the email notifying you of the documents on which your electronic signature is requested or the documents themselves. You may also contact Investment Advisor to be directed to its and/or Custodian’s privacy policy.

Accessing the DocuSign system via a mobile device involves the electronic transmission of information across the networks of your wireless service provider. Counterparty is not responsible for the privacy or security of wireless data transmissions. Use only reputable service

providers and check with your wireless service provider for information about its privacy and security practices.

The Effect of Your Consent and Agreement

By checking the “I agree to use Electronic Records and Signatures” box and then clicking the “Review Documents” button below you are providing your electronic signature on this Agreement and indicating that you acknowledge, agree and demonstrate that:

- You have read this Consent and Agreement and understand it.
- You consent to electronically receive and review the electronic documents included in the electronic envelopes that will be sent to you.
- You have the hardware and software described above, an active email account, and you can (1) access, view, and print on paper or save on your computer this electronic Consent and Agreement and the electronic documents and (2) access the Web sites described above, including their content, in either HTML or PDF formats, as applicable.
- Your electronic signature on any of the electronic documents, including this Consent and Agreement, will bind you to that document the same as if you had signed a paper copy of the document with an ink pen. You will not contest the validity or enforceability of any electronic document you receive or electronically sign because the document and your signature are in electronic form.

You understand that you should contact Investment Advisor to report any problem with the electronic signature process.