



Happy Holidays

from the

STONEBRIDGE FAMILY

Dear Clients, Partnered Advisors, Community, Family, and Friends,

DECEMBER 12, 2024

Each year, the holiday season brings forward a more purposeful time for deeper reflection and a spirit of thankfulness. On behalf of our Stonebridge Family, we wish to express our sincere gratitude for your continued trust in us. We find nothing more rewarding than having the opportunity of helping you meet your investment goals.

Through our growth, Stonebridge works together in all facets with one goal: YOU are always the central focus of the services we provide. We continue to invest heavily in our ability to customize client investment portfolios to meet your individual needs, making improvements to our proprietary portfolio management system (Stonebridge Analytics) and integrating our third-party portfolio management and client reporting tool (Advent Black Diamond) and a new client relationship management platform (Black Diamond CRM).

As of December 11th, 2024, we are proud to have reached \$2.3 billion in assets under management! This year, we were also pleased to announce our new consulting relationship that has brought in an additional \$1.3 billion in assets under advisement. We continue improving our analytical tools, building efficiencies in processes, and expanding our investment solutions. Prioritizing proactive communication across our emails, website publications, and in-person conversations, we also continue generating greater informative content and educational resources: market and economic updates, industry news and trends, and our thoughtful Stonebridge perspectives.

This year was significant for Stonebridge in terms of expanding our company's scope of services and strategic workforce planning to align talent with our future needs. In particular, we gained three new valuable employees and transitioned several individuals into new roles, highlighting our continuous professional development. We are poised to ensure agility in facing changes to technology and in our industry.

Stonebridge continues to serve as a dedicated leader to our community, supporting both local and national nonprofit organizations, foundations, and charities. We are excited to enter the second year of our 2024-2026 Community Partnership Program pledge with Open Arms of Minnesota - a local nonprofit organization whose mission is "By providing food as medicine, we nourish our clients and build community." As part of our partnership pledge, we will continue working with our previous community partners and supporting their visions and efforts.

In honor of our clients, partners, family, and friends, we have donated to two incredible organizations: Keystone Community Services and The Morgan Adams Foundation.

The Stonebridge Family has many things to be thankful for, but we are especially grateful for you. May this holiday season bring you and your families comfort, joy, and a prosperous New Year!

2024 RECOGNITIONS AT A GLANCE

Stonebridge Capital Advisors

2024 Torch Award for Ethics Finalist – Better Business Bureau
2024 Fast 50 Award – Minneapolis/St. Paul Business Journal
2024 Celebrate Business Success Award – St. Paul Area Chamber

Heidi Hukriede, CFA | COO, Portfolio Manager

2024 Top Women in Finance, Hall of Fame – Finance & Commerce
2024 Notable Women in Banking & Finance – Twin Cities Business

Robert Kincade | CEO, Senior Wealth Advisor, Portfolio Manager
2024 Five Star Wealth Manager – Minneapolis/St. Paul Business Journal

Michelle Terkoski | Administrative Coordinator
Achievement Award Finalist – Admin Awards

2024 CHARITABLE DONATION

Keystone Community Services

Founded in 1939 in St. Paul, Minnesota, this organization provides a variety of programming services and human resources with a mission is "to strengthen the capacity of individuals and families to improve their quality of life."

The Morgan Adams Foundation

Founded in 1998 in Denver, Colorado, this organization's purpose "to fund kids' cancer research by raising awareness of and educating the need for pediatric and young adult specific cancer treatments."

Robert Kincade
President &
Chief Executive Officer

Heidi Hukriede, CFA
Chief Operating Officer

Ronald Hume
Executive Vice President

Lory Wessel
Chief Administrative Officer

John Schonberg, CFA
Chief Investment Officer

