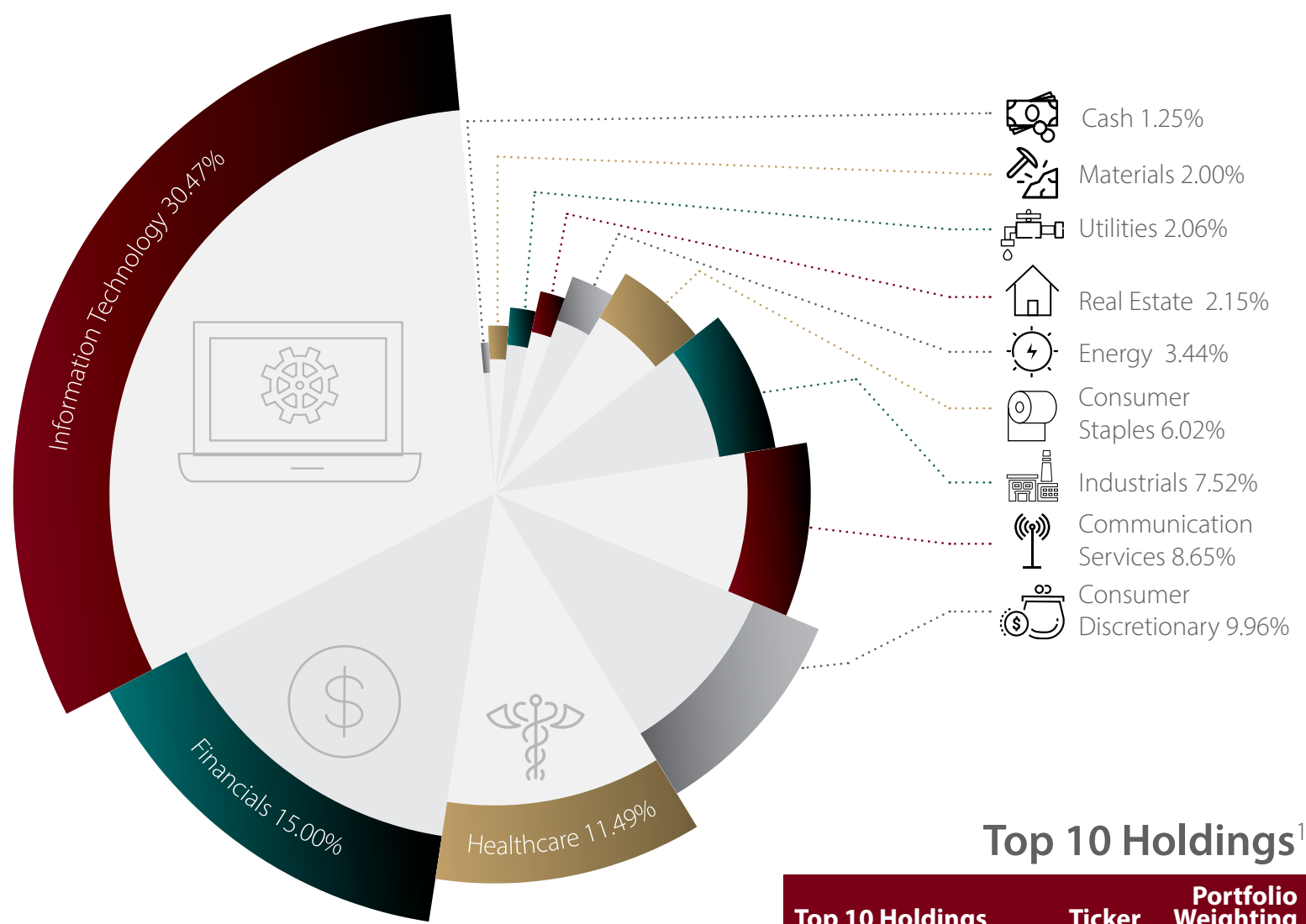


Core Equity Strategy

As of **March 31, 2025**

This is an active strategy that seeks long-term growth of capital. This strategy targets 45-50 equity positions and is designed to remain invested through market volatility and economic cycles. The Core Equity strategy selects 45-50 stocks from the S&P 500 Index using a multi-factor model that seeks to identify US large-cap businesses with industry-leading scale, operating efficiency, and earnings momentum. The strategy offers concentrated exposure to established market leaders while maintaining a sector composition similar to the index.

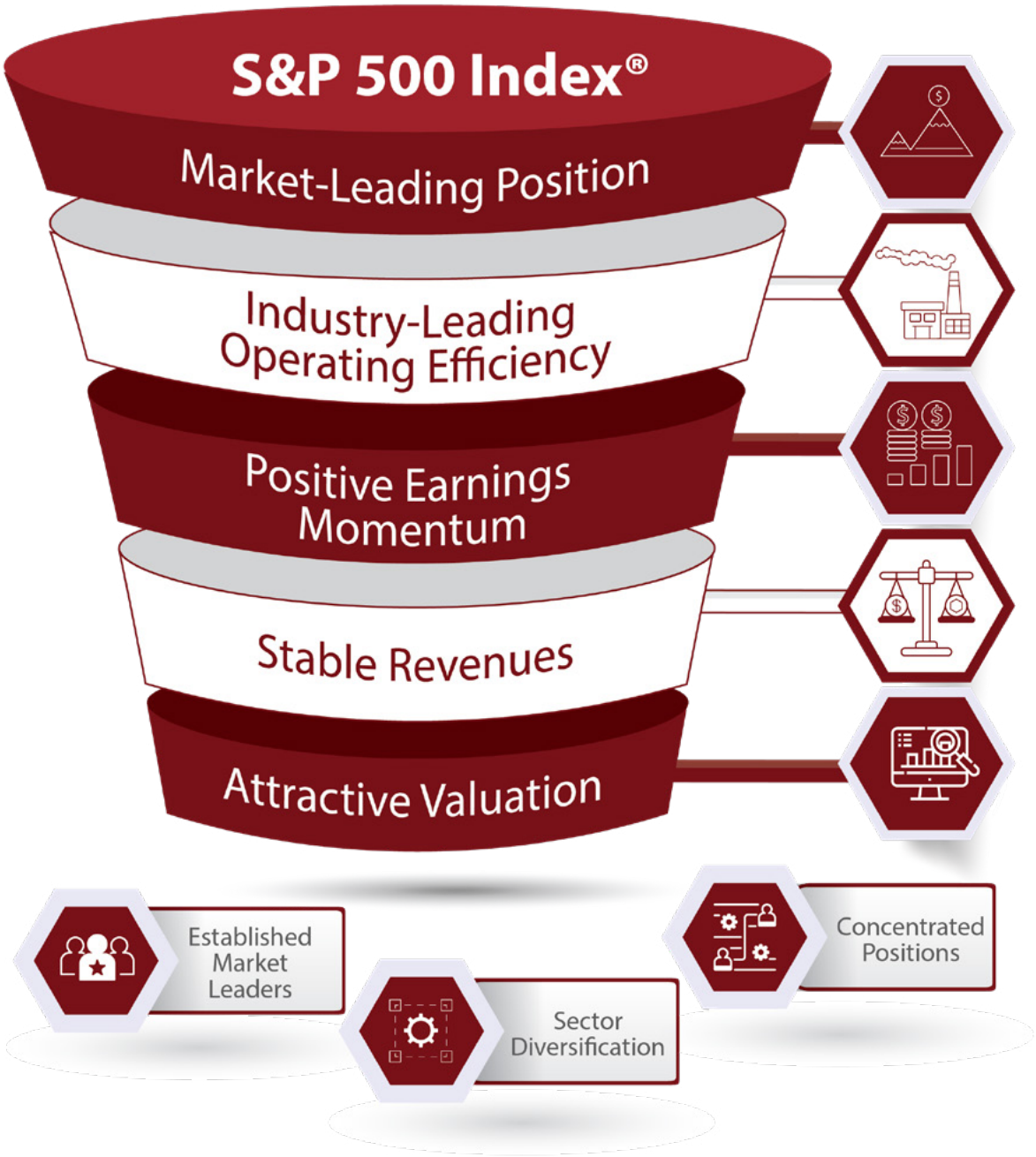
Equity Sector Weighting¹



Top 10 Holdings¹

| Top 10 Holdings | Ticker | Portfolio Weighting |
|-------------------------|--------|---------------------|
| VeriSign Inc | VRSN | 4.67% |
| Netflix Inc | NFLX | 4.58% |
| Amphenol Corp | APH | 4.31% |
| Alphabet Inc | GOOGL | 4.07% |
| Motorola Solutions | MSI | 3.98% |
| Microsoft Corp | MSFT | 3.72% |
| Cognizant Tech Sol Corp | CTSH | 3.57% |
| NVIDIA Corp | NVDA | 3.54% |
| Adobe Inc | ADBE | 3.46% |
| Accenture Plc | ACN | 3.22% |

1. Equity Sector Weightings and Top Stock Holdings are as of this report and are subject to change without notice.



Disclosure Information

The S&P 500® is widely regarded as the best single gauge of large-cap U.S. equities. The index includes 500 leading companies and covers approximately 80% of available market capitalization. Please see important applicable disclosures at the end of this presentation.

Disclosure Information Continued

General Disclosure

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Use of Indicators

Corbett Road’s quantitative models utilize a variety of factors to analyze trends in economic conditions and the stock market to determine asset and sector allocations that help us gauge market movements in the short- and intermediate term. There is no guarantee that these models or any of the factors used by these models will result in favorable performance returns. Models used by Corbett Road are reviewed periodically. Inputs, factors, and indicators used in these models are subject to change.

Cash Position

We continue to treat cash as an asset class. As such, unless determined to the contrary by CRCM, all cash positions (money markets, etc.) shall continue to be included as part of assets under management for purposes of calculating our advisory fee. This includes our TX (tactical portfolio strategies) that could experience a substantial shift in cash for short or intermediate time periods. At any specific point in time, depending on perceived or anticipated market conditions and events, we may maintain cash positions for defensive purposes. All portfolios are actively managed and monitored during these high cash allocation periods and may shift back to increased equity and/or fixed income allocations at any time. There is no guarantee that such anticipated market conditions and events will occur. In addition, while assets are maintained in cash, such amounts miss the opportunity for market advances. Depending on current yields, at any point and time, our advisory fee could exceed the interest paid by the client’s money market fund.

Core Equity Strategy

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Corbett Road Wealth Management, LLC (CRWM) is a dba name for the group of financial advisors who are registered with Spire Wealth Management, LLC, a subsidiary of Spire Investment Partners LLC.

Together, CRCM and CRWM manage a variety of investment strategies that are offered to different groups of clients. CRCM offers investment advisory and sub-advisory services to institutionally oriented accounts, which include accounts with financial advisory firms as well as clients who open an account with \$20 million or more in assets with the Firm, while CRWM offers advisory services to directly to individual High Net Worth and retail investors.

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