

# EVERCORE

## **Evercore Wealth Management Appoints Daniel Stolfa Managing Director and Wealth & Fiduciary Advisor**

**NEW YORK, August 29, 2018** – Evercore Wealth Management, LLC today announced the appointment of Daniel Stolfa as a Managing Director and Wealth & Fiduciary Advisor at the firm’s office in Minneapolis.

“Dan is a welcome addition to our growing Minneapolis office,” said Jeff Maurer, CEO of Evercore Wealth Management and Chairman of Evercore Trust Company, N.A. “He will serve clients throughout the Midwest with comprehensive, goals-based wealth planning advice, backed by our national Wealth & Fiduciary team.”

Prior to joining Evercore, Mr. Stolfa worked as a wealth advisor to high net worth families at Stiles Financial Services and, earlier, as a wealth advisor at Stolfa Private Wealth Advisors and the Private Banking and Investment Group at Merrill Lynch. Dan has also practiced law as an estate planning attorney, served as the planned giving officer for Mitchell Hamline School of Law, and worked as a senior tax specialist with KPMG. He received his J.D. and LL.M. in Taxation at the Mitchell Hamline School of Law and holds the Certified Financial Planner<sup>™</sup> and Accredited Investment Fiduciary<sup>®</sup> designations.

Mr. Stolfa will report to Martha Pomerantz, a Partner at the firm and Manager of the Minneapolis office.

### **About Evercore Wealth Management**

Evercore Wealth Management, LLC, a subsidiary of Evercore, serves high net worth families, endowments and foundations, delivering customized investment management, financial planning, and trust and custody services. Evercore Wealth Management is a registered investment advisor with the U.S. Securities and Exchange Commission, with offices in New York, Minneapolis, Palm Beach, San Francisco, and Tampa. The firm manages \$7.7 billion in client assets as of June 30, 2018. Additionally, Evercore Wealth Management offers personal trust and custody services to its clients through Evercore Trust Company, N.A., a national trust bank, and Evercore Trust Company of Delaware. More information about planning, investing, and personal fiduciary services at Evercore Wealth Management can be found at [www.evercorewealthmanagement.com](http://www.evercorewealthmanagement.com).

### **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](http://www.evercore.com).

**Investor Contact:** Jamie Easton  
Head of Investor Relations, Evercore  
+1.212.857.3100

**Media Contact:** Aline Sullivan  
Lexicon Associates, or Evercore Wealth Management, LLC and  
Evercore Trust Company, N.A.  
+1.203.918.3389