EVERCORE

# Evercore Wealth Management Promotes
# Jonathan Bergner, Nancy Gabel to Partner

**NEW YORK, March 2, 2020** – Evercore Wealth Management today announced the promotions of Portfolio Manager Jonathan Bergner and Financial Advisor Nancy Gabel to Partner.

"Jonathan and Nancy are experienced wealth management professionals who contribute significantly to the growth of our firm," said Chris Zander, CEO of Evercore Wealth Management and Evercore Trust Company, N.A. "These well-deserved promotions reflect their respective successes in their work and their commitment to meeting our clients' goals and sustaining their trust."

Mr. Bergner is a Portfolio Manager at Evercore Wealth Management. He works closely with the firm's Wealth & Fiduciary Advisors, providing asset allocation and customized portfolio management to private clients, foundations and endowments.

Prior to joining Evercore Wealth Management in 2012 as a Managing Director, he led a team of portfolio managers at U.S. Trust in managing the assets of high net worth individuals and family foundations. He earlier directed investments at Ader Associates, a New York-based financial planning firm. He has a B.S. degree from Hobart College and holds the Chartered Financial Analyst and Certified Financial Planner designations. He is a member of the editorial review board of the Journal of Financial Planning and the New York Society of Security Analysts.

Ms. Gabel is a Financial Advisor at Evercore Wealth Management and Evercore Trust Company. She works closely with high net worth families and their attorneys and tax advisors. She represents Evercore Wealth Management and Evercore Trust Company at professional association events and leads the firms' Continuing Legal Education, or CLE, program.

Prior to joining Evercore Wealth Management in 2010 as a Managing Director, Ms. Gabel ran the estate planning department at U.S. Trust and headed the firm's intergenerational wealth planning group. She previously worked at Fried, Frank, Harris, Shriver & Jacobson as a trust and estates lawyer. She has a B.A., magna cum laude, from Ithaca College and a J.D. from New England School of Law. She is a member of both the New York and Massachusetts Bar Associations.

**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 $9.1 billion in client assets as of December 31, 2019. Additionally, Evercore Wealth Management offers personal trust and custody services to its clients through Evercore Trust Company, N.A. More information about planning, investing, and personal fiduciary services at Evercore Wealth Management can be found at www.evercorewealthandtrust.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, the Middle East and Asia. For more information, please visit www.evercore.com.

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