

Advisory Individual Retirement Accounts Participating Banks

| | | | |
|-----------------------|----------|--------------------------|----------|
| Region 1 | 2 | Region 5 | 6 |
| Massachusetts, MA | | Alabama, AL | |
| Maine, ME | | Arkansas, AR | |
| New Hampshire, NH | | Arizona, AZ | |
| Rhode Island, RI | | Kentucky, KY | |
| Vermont, VT | | Louisiana, LA | |
| Region 2 | 3 | Missouri, MO | |
| Connecticut, CT | | Oklahoma, OK | |
| New York, NY | | Texas, TX | |
| Region 3 | 4 | Tennessee, TN | |
| Alaska, AK | | Region 6 | 7 |
| Colorado, CO | | District of Columbia, DC | |
| Hawaii, HI | | Delaware, DE | |
| Idaho, ID | | Florida, FL | |
| Kansas, KS | | Georgia, GA | |
| Montana, MT | | Maryland, MD | |
| Nebraska, NE | | Mississippi, MS | |
| New Mexico, NM | | North Carolina, NC | |
| Nevada, NV | | South Carolina, SC | |
| Oregon, OR | | Region 7 | 8 |
| Utah, UT | | Iowa, IA | |
| Washington, WA | | Illinois, IL | |
| Wyoming, WY | | Indiana, IN | |
| Region 4 | 5 | Michigan, MI | |
| California, CA | | Minnesota, MN | |
| | | North Dakota, ND | |
| | | Ohio, OH | |
| | | South Dakota, SD | |
| | | Wisconsin, WI | |
| | | Region 8 | 9 |
| | | New Jersey, NJ | |
| | | Pennsylvania, PA | |
| | | Virginia, VA | |
| | | West Virginia, WV | |
| | | Others | |

Participating Banks

Region 1

EFFECTIVE: MAY 13, 2023

Private Wealth
Management
williamblair.com

MA, ME, NH, RI, VT

| | Position |
|---|----------|
| Synchrony Bank | 1 |
| CIBC Bank USA | 2 |
| State Bank of India | 3 |
| American Express National Bank | 4 |
| Barclays Bank Delaware | 5 |
| East West Bank | 6 |
| Goldman Sachs Bank USA | 7 |
| The Bank of East Asia Ltd. | 8 |
| BMO Bank National Association | 9 |
| Umpqua Bank | 10 |
| Enterprise Bank & Trust | 11 |
| PNC Bank, National Association | 12 |
| Wells Fargo Bank, National Association | 13 |
| JPMorgan Chase Bank, National Association | 14 |
| Bank of Baroda | 15 |
| UBS Bank USA | 16 |
| Manufacturers and Traders Trust Company | 17 |
| Capital One, National Association | 18 |
| Deutsche Bank Trust Company Americas | 19 |
| State Street Bank and Trust Company | 20 |
| Associated Bank, National Association | 21 |
| U.S. Bank National Association | 22 |
| Cadence Bank | 23 |
| EagleBank | 24 |
| Pinnacle Bank | 25 |
| Synovus Bank | 26 |
| The Huntington National Bank | 27 |
| BankUnited, National Association | 28 |
| Union Bank and Trust Company | 29 |
| Citibank, National Association | 30 |
| Morton Community Bank | 31 |
| Bank of China | 32 |

Excess Banks

| | |
|--|---|
| U.S. Bank National Association | 1 |
| Wells Fargo Bank, National Association | 2 |

Participating Banks

Region 2

EFFECTIVE: MAY 13, 2023

Private Wealth
Management
williamblair.com

CT, NY

Position

| | |
|---|----|
| American Express National Bank | 1 |
| State Street Bank and Trust Company | 2 |
| Barclays Bank Delaware | 3 |
| UBS Bank USA | 4 |
| Wells Fargo Bank, National Association | 5 |
| JPMorgan Chase Bank, National Association | 6 |
| East West Bank | 7 |
| Bank of Baroda | 8 |
| CIBC Bank USA | 9 |
| PNC Bank, National Association | 10 |
| Enterprise Bank & Trust | 11 |
| Capital One, National Association | 12 |
| Manufacturers and Traders Trust Company | 13 |
| U.S. Bank National Association | 14 |
| Goldman Sachs Bank USA | 15 |
| Synchrony Bank | 16 |
| State Bank of India | 17 |
| Deutsche Bank Trust Company Americas | 18 |
| BMO Bank National Association | 19 |
| Associated Bank, National Association | 20 |
| Cadence Bank | 21 |
| EagleBank | 22 |
| Pinnacle Bank | 23 |
| Synovus Bank | 24 |
| The Huntington National Bank | 25 |
| The Bank of East Asia Ltd. | 26 |
| Umpqua Bank | 27 |
| Union Bank and Trust Company | 28 |
| BankUnited, National Association | 29 |
| Citibank, National Association | 30 |
| Morton Community Bank | 31 |
| Bank of China | 32 |

Excess Banks

| | |
|--|---|
| U.S. Bank National Association | 1 |
| Wells Fargo Bank, National Association | 2 |

Participating Banks

Region 3

EFFECTIVE: MAY 13, 2023

Private Wealth
Management
williamblair.com

AK, CO, HI, ID, KS, MT, NE, NM, NV, OR, UT, WA, WY CT, NY

Position

| | |
|---|----|
| State Street Bank and Trust Company | 1 |
| Goldman Sachs Bank USA | 2 |
| JPMorgan Chase Bank, National Association | 3 |
| American Express National Bank | 4 |
| State Bank of India | 5 |
| Wells Fargo Bank, National Association | 6 |
| UBS Bank USA | 7 |
| CIBC Bank USA | 8 |
| East West Bank | 9 |
| The Bank of East Asia Ltd. | 10 |
| Synchrony Bank | 11 |
| Enterprise Bank & Trust | 12 |
| Capital One, National Association | 13 |
| U.S. Bank National Association | 14 |
| Barclays Bank Delaware | 15 |
| Bank of Baroda | 16 |
| PNC Bank, National Association | 17 |
| Manufacturers and Traders Trust Company | 18 |
| Deutsche Bank Trust Company Americas | 19 |
| BMO Bank National Association | 20 |
| Associated Bank, National Association | 21 |
| Cadence Bank | 22 |
| EagleBank | 23 |
| Pinnacle Bank | 24 |
| Synovus Bank | 25 |
| The Huntington National Bank | 26 |
| BankUnited, National Association | 27 |
| Umpqua Bank | 28 |
| Union Bank and Trust Company | 29 |
| Citibank, National Association | 30 |
| Morton Community Bank | 31 |
| Bank of China | 32 |

Excess Banks

| | |
|--|---|
| U.S. Bank National Association | 1 |
| Wells Fargo Bank, National Association | 2 |

Participating Banks

Region 4

EFFECTIVE: MAY 13, 2023

Private Wealth
Management
williamblair.com

| CA | Position |
|---|---------------------|
| Capital One, National Association | 1 |
| American Express National Bank | 2 |
| Goldman Sachs Bank USA | 3 |
| Wells Fargo Bank, National Association | 4 |
| Manufacturers and Traders Trust Company | 5 |
| State Bank of India | 6 |
| CIBC Bank USA | 7 |
| UBS Bank USA | 8 |
| Enterprise Bank & Trust | 9 |
| East West Bank | 10 |
| Barclays Bank Delaware | 11 |
| Umpqua Bank | 12 |
| BMO Bank National Association | 13 |
| Synovus Bank | 14 |
| The Huntington National Bank | 15 |
| The Bank of East Asia Ltd. | 16 |
| BankUnited, National Association | 17 |
| Union Bank and Trust Company | 18 |
| Synchrony Bank | 19 |
| Bank of Baroda | 20 |
| PNC Bank, National Association | 21 |
| JPMorgan Chase Bank, National Association | 22 |
| State Street Bank and Trust Company | 23 |
| Deutsche Bank Trust Company Americas | 24 |
| Associated Bank, National Association | 25 |
| U.S. Bank National Association | 26 |
| Cadence Bank | 27 |
| EagleBank | 28 |
| Pinnacle Bank | 29 |
| Citibank, National Association | 30 |
| Morton Community Bank | 31 |
| Bank of China | 32 |
| | Excess Banks |
| U.S. Bank National Association | 1 |
| Wells Fargo Bank, National Association | 2 |

Participating Banks Region 5

EFFECTIVE: MAY 13, 2023

Private Wealth
Management
williamblair.com

AL, AR, AZ, KY, LA, MO, OK, TX, TN

| | Position |
|---|----------|
| Goldman Sachs Bank USA | 1 |
| The Bank of East Asia Ltd. | 2 |
| Bank of Baroda | 3 |
| CIBC Bank USA | 4 |
| UBS Bank USA | 5 |
| JPMorgan Chase Bank, National Association | 6 |
| American Express National Bank | 7 |
| East West Bank | 8 |
| Wells Fargo Bank, National Association | 9 |
| BankUnited, National Association | 10 |
| PNC Bank, National Association | 11 |
| Enterprise Bank & Trust | 12 |
| Capital One, National Association | 13 |
| Umpqua Bank | 14 |
| Barclays Bank Delaware | 15 |
| Synchrony Bank | 16 |
| State Bank of India | 17 |
| Manufacturers and Traders Trust Company | 18 |
| State Street Bank and Trust Company | 19 |
| Deutsche Bank Trust Company Americas | 20 |
| BMO Bank National Association | 21 |
| Associated Bank, National Association | 22 |
| U.S. Bank National Association | 23 |
| Cadence Bank | 24 |
| EagleBank | 25 |
| Pinnacle Bank | 26 |
| Union Bank and Trust Company | 27 |
| Synovus Bank | 28 |
| The Huntington National Bank | 29 |
| Citibank, National Association | 30 |
| Morton Community Bank | 31 |
| Bank of China | 32 |

Excess Banks

| | |
|--|---|
| U.S. Bank National Association | 1 |
| Wells Fargo Bank, National Association | 2 |

Participating Banks

Region 6

EFFECTIVE: MAY 13, 2023

Private Wealth
Management
williamblair.com

DC, DE, FL, GA, MD, MS, NC, SC

| | Position |
|---|----------|
| State Bank of India | 1 |
| Goldman Sachs Bank USA | 2 |
| UBS Bank USA | 3 |
| American Express National Bank | 4 |
| Manufacturers and Traders Trust Company | 5 |
| The Huntington National Bank | 6 |
| Wells Fargo Bank, National Association | 7 |
| Barclays Bank Delaware | 8 |
| CIBC Bank USA | 9 |
| PNC Bank, National Association | 10 |
| Capital One, National Association | 11 |
| Synchrony Bank | 12 |
| Bank of Baroda | 13 |
| JPMorgan Chase Bank, National Association | 14 |
| Synovus Bank | 15 |
| Deutsche Bank Trust Company Americas | 16 |
| BMO Bank National Association | 17 |
| Enterprise Bank & Trust | 18 |
| State Street Bank and Trust Company | 19 |
| Associated Bank, National Association | 20 |
| U.S. Bank National Association | 21 |
| Cadence Bank | 22 |
| EagleBank | 23 |
| Pinnacle Bank | 24 |
| BankUnited, National Association | 25 |
| East West Bank | 26 |
| The Bank of East Asia Ltd. | 27 |
| Umpqua Bank | 28 |
| Union Bank and Trust Company | 29 |
| Citibank, National Association | 30 |
| Morton Community Bank | 31 |
| Bank of China | 32 |

Excess Banks

| | |
|--|---|
| U.S. Bank National Association | 1 |
| Wells Fargo Bank, National Association | 2 |

Participating Banks

Region 7

EFFECTIVE: MAY 13, 2023

Private Wealth
Management
williamblair.com

IA, IL, IN, MI, MN, ND, OH, SD, WI

| | Position |
|---|----------|
| Goldman Sachs Bank USA | 1 |
| State Bank of India | 2 |
| Synchrony Bank | 3 |
| Wells Fargo Bank, National Association | 4 |
| UBS Bank USA | 5 |
| Manufacturers and Traders Trust Company | 6 |
| Enterprise Bank & Trust | 7 |
| CIBC Bank USA | 8 |
| Umpqua Bank | 9 |
| The Bank of East Asia Ltd. | 10 |
| American Express National Bank | 11 |
| EagleBank | 12 |
| The Huntington National Bank | 13 |
| PNC Bank, National Association | 14 |
| East West Bank | 15 |
| Bank of Baroda | 16 |
| JPMorgan Chase Bank, National Association | 17 |
| Synovus Bank | 18 |
| Deutsche Bank Trust Company Americas | 19 |
| BMO Bank National Association | 20 |
| Barclays Bank Delaware | 21 |
| Associated Bank, National Association | 22 |
| Cadence Bank | 23 |
| Pinnacle Bank | 24 |
| U.S. Bank National Association | 25 |
| BankUnited, National Association | 26 |
| State Street Bank and Trust Company | 27 |
| Capital One, National Association | 28 |
| Union Bank and Trust Company | 29 |
| Citibank, National Association | 30 |
| Morton Community Bank | 31 |
| Bank of China | 32 |

Excess Banks

| | |
|--|---|
| U.S. Bank National Association | 1 |
| Wells Fargo Bank, National Association | 2 |

Participating Banks

Region 8

EFFECTIVE: MAY 13, 2023

Private Wealth
Management
williamblair.com

NJ, PA, VA, WV, Others

| | Position |
|---|----------|
| State Street Bank and Trust Company | 1 |
| American Express National Bank | 2 |
| CIBC Bank USA | 3 |
| JPMorgan Chase Bank, National Association | 4 |
| Bank of Baroda | 5 |
| BMO Bank National Association | 6 |
| East West Bank | 7 |
| Barclays Bank Delaware | 8 |
| BankUnited, National Association | 9 |
| PNC Bank, National Association | 10 |
| The Bank of East Asia Ltd. | 11 |
| EagleBank | 12 |
| Manufacturers and Traders Trust Company | 13 |
| State Bank of India | 14 |
| Capital One, National Association | 15 |
| Goldman Sachs Bank USA | 16 |
| Deutsche Bank Trust Company Americas | 17 |
| UBS Bank USA | 18 |
| Enterprise Bank & Trust | 19 |
| Associated Bank, National Association | 20 |
| Wells Fargo Bank, National Association | 21 |
| Cadence Bank | 22 |
| Pinnacle Bank | 23 |
| U.S. Bank National Association | 24 |
| Synchrony Bank | 25 |
| Synovus Bank | 26 |
| The Huntington National Bank | 27 |
| Umpqua Bank | 28 |
| Union Bank and Trust Company | 29 |
| Citibank, National Association | 30 |
| Morton Community Bank | 31 |
| Bank of China | 32 |

Excess Banks

| | |
|--|---|
| U.S. Bank National Association | 1 |
| Wells Fargo Bank, National Association | 2 |