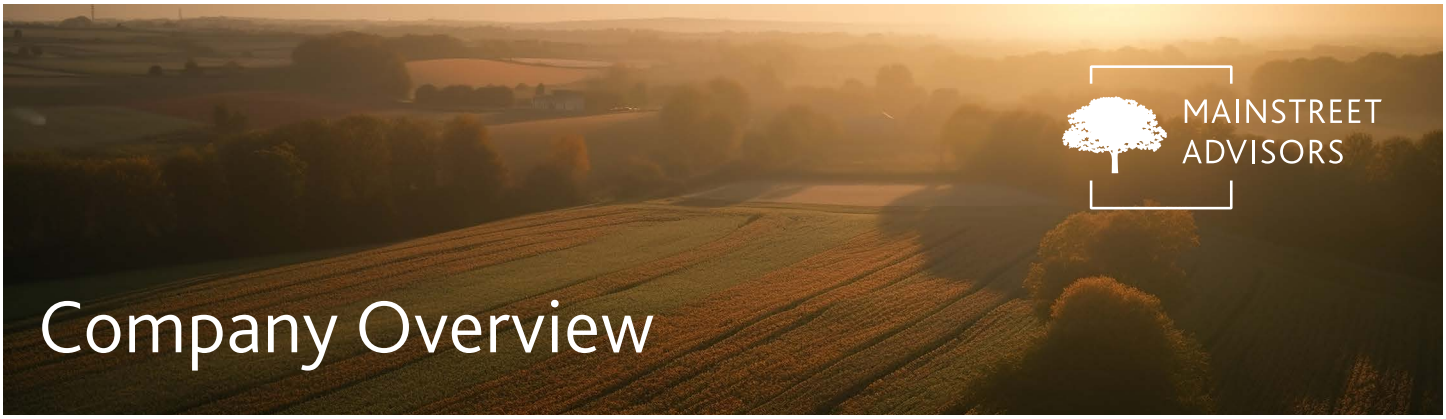


Company Overview

Founded in 2003, MainStreet Advisors is an independent, federally registered investment adviser delivering institutional-quality investment management and advisory services. We combine deep investment expertise, a team-based research process, and customizable portfolio solutions to help our clients serve their end-investors with confidence.

Who We Serve

We partner with organizations seeking a disciplined investment process, comprehensive oversight, and customized client solutions, including:

- Bank Trust & Wealth Management Groups
- Independent Trust Companies
- Registered Investment Advisors
- Family Offices
- Accounting & Tax Practices
- Law Firms

OUR FIRM AT A GLANCE

APPROXIMATELY $6 BILLION in combined assets under advisement and management (as of October 31, 2025).

A DEEPLY CREDENTIALED STAFF including nine CFA® Charterholders and six advanced degrees.

A TEAM-BASED INVESTMENT APPROACH integrating equity, fixed income, and asset-allocation specialists.

A PORTFOLIO MANAGEMENT TEAM averaging nearly 30 years of experience, organized across dedicated equity and fixed-income teams.

What We Offer

MainStreet delivers a full suite of investment solutions designed to meet a wide range of client needs—from turnkey portfolios to fully customized mandates.

INNOVATIVE SOLUTION & SERVICE OFFERING

We offer five risk-based investment objectives and can tailor portfolios to accommodate individual equities, fixed income securities, mutual funds, ETFs, and specialized client preferences such as equity income, SRI/ESG, and tax-optimized strategies.

CLIENT SOLUTIONS

Direct Indexing (DI)
Personalized tax-efficient equity exposure

Manager Select (MS)
Third-party manager access and oversight

Separate Account Management (SAM)
High-conviction equity & fixed income

Fund Allocation Portfolios (FAP)
Diversified multi-asset portfolios

ALTERNATIVES

- Private Equity
- Private Credit
- Hedge Funds
- Venture Capital
- Private Real Estate
- Custom Multi-Asset Solutions

MainStreet Investment Advisors, LLC ("MainStreet") is a federally registered investment adviser under the Investment Advisers Act of 1940. Registration as an investment adviser does not constitute an endorsement of MainStreet by the SEC nor does it indicate that MainStreet has attained a particular level of skill or ability. RSOVV001_12_05_25