



FOUNDED IN 2003, MAINSTREET ADVISORS IS AN INVESTMENT ADVISORY FIRM COMMITTED TO PROVIDING HIGH QUALITY INVESTMENT MANAGEMENT AND ADVISORY SERVICES TO OUR CLIENTS. WE OFFER TIMELY, UNBIASED INVESTMENT ADVICE.

### FIRM OVERVIEW

- We provide investment management services for:
  - Bank Trust and Wealth Management
  - Trust Companies
  - Institutional Clients
  - Endowments/Foundations
  - Insurance Companies
  - Municipalities
- Our firm has approximately \$14.1 billion in combined assets under advisement and assets under management as of June 30, 2023.
- Our team-based approach is an integral part of our portfolio management strategy and provides the platform upon which our investment decisions are made.
- Our portfolio management team averages 23 years of experience and is organized into both equity and fixed income teams.
- Our staff has an aggregate of 9 advanced degrees, 10 Chartered Financial Analyst designations, and 2 CERTIFIED FINANCIAL PLANNERS™.
- Our customized solutions may be suitable for clients who seek equity income-oriented portfolios and/or socially responsible portfolios.

### INNOVATIVE SOLUTION AND SERVICE OFFERING

- With five risk-based investment objectives, our portfolios can be customized to include investments in individual equities, fixed income, mutual funds, and exchange-traded funds.
- We focus on broad asset allocation achieved through the use of more than 10 asset classes.
- We build investment solutions to meet a broad range of client needs including Separate Account Management (SAM) and Fund Allocation Portfolios (FAP).

### EQUITY STRATEGIES

- Large Cap Blend
- Dividend Income
- Sustainable Leaders
- All Cap

### FIXED-INCOME STRATEGIES

- Short-Term Liquidity Asset Management
- 1-3 Government Liquidity Asset Management
- 1-3 Government/Corporate Liquidity Asset Management
- Intermediate Government
- Intermediate Government Credit
- Core Fixed
- Preferred
- Managed Maturities
- Tax Exempt