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 $12.7 billion in combined assets under advisement and assets under management as of September 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 3 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