

LEGACY BRIDGE

The logo features the words "LEGACY BRIDGE" in a large, bold, orange serif font. Below this, a thin orange arc spans the width of the text. Underneath the arc, the words "PRIVATE FAMILY OFFICES" are written in a smaller, grey, sans-serif font.

PRIVATE FAMILY OFFICES

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FOR IMMEDIATE RELEASE

LEGACY BRIDGE EXPANDS ITS INVESTMENT MANAGEMENT TEAM AND RESEARCH CAPABILITIES

Steve Musser, MBA, CFA®, Joins Growing Multi-Family Office as Senior Investment Strategist

NOVEMBER 20, 2023—WEST DES MOINES, IOWA—Legacy Bridge Private Family Offices is pleased to announce that Steve Musser, MBA, CFA®, has joined the firm as Senior Investment Strategist. This most recent addition to the growing firm deepens the already robust capabilities of its Investment Management team, where Steve will focus his expertise on investment strategy, portfolio management and research in support of ultra-high-net-worth families' investment goals and objectives.

Steve holds both his Undergraduate in Economics and Masters in Finance Degrees from the University of Missouri-Columbia. Additionally, Steve holds the Chartered Financial Analyst® (CFA®) designation, one of the highest distinctions in the investment management. With a career spanning approximately thirty years, prior to joining Legacy Bridge, Steve held senior positions at Benson Wealth Management, Sophus Capital, Principal Financial Group, and A.G. Edwards. Steve will be reporting directly to Tim Kadlec, Chief Investment Officer for Legacy Bridge.

"We are excited to have Steve as part of the Legacy Bridge family and know that our clients, as well as our closely integrated internal team, will benefit from his expertise, as well as enjoy their interactions with him," said Tim Kadlec. "Fit, whether we're talking about a potential new client or team member, is incredibly important to us. Steve is exactly who and what we were seeking for ourselves and those we serve."

Mike Zuendel, Founder and CEO of Legacy Bridge, said, "We continue to execute on our strategic growth initiatives and are looking to 2024 as being another transformative year for our firm. Steve will certainly contribute to this in meaningful and measurable ways. The opening of our new national headquarters next Summer, the scaling of our business through both inorganic and organic growth, and the acquisition of new talent each contribute to this ongoing transformation. And yet, even with all we are discussing, it is equally important to highlight that which will not change: a culture of 'thriving' for both the families we are privileged to work with and our dedicated team, and the consistent delivery of an exceptional client experience."

About Legacy Bridge Private Family Offices

Legacy Bridge Private Family Offices was established by Founder and CEO Mike Zuendel to provide tailored wealth and investment management capabilities, and family office services to serve high-net-worth clients. The firm exists at the intersection of a client's family, their enterprise and wealth—the very complex space where the rational and emotional create ever-evolving dynamics that need to be carefully understood and expertly managed. The firm is headquartered in West Des Moines, IA, with offices in Telluride, CO and New York, NY. To learn more, please visit <https://legacybridgepfo.com>.