ABOUT JANNEY

OVERVIEW*

- Total offices: 129 in 21 states
- Total number of employees: 2,200+
- 38 consecutive years of operating profitability, even during times of market turbulence
- Financial Advisors: 900+
- Assets Under Advisement: $186+ billion
- Client accounts: 455,000+ individuals
- 275+ Advisors received industry recognition in 2025**
- Official Wealth Management Partner of the Philadelphia Eagles

OUR COMMITMENT

You need to feel confident that the wealth management firm you choose will be there over the long run to support your financial goals. Janney delivers by putting clients at the center of everything we do. The pillars of your relationship with Janney include:

A Legacy of Meeting Client Needs.

With roots tracing back to 1832, Janney has over 190 years of experience delivering trusted service and advice. Our relationships are built on a foundation of trust, guided by our core values: focus on the client, do what's right, win together, act with purpose, and own the outcome.

Privately Held—Focused on You.

As a privately-held firm, Janney is dedicated to meeting the long-term needs of our clients, free from the pressures of quarterly earnings and market demands faced by public companies. We offer the personal attention of a boutique firm, paired with the comprehensive services and resources of a larger organization, all while maintaining a client-first approach.

Consistent Financial Strength.

Janney has reported steady and stable earnings with a record of operating profitability that goes back over 38 years. Our available capital exceeds regulatory requirements and is strengthened by access to a diverse set of sources to support our overall financial stability.

A Culture of Service and Collaboration.

Our people are our greatest asset. Janney attracts, rewards, and retains top financial professionals, bringing deep knowledge and industry expertise to the firm. Janney's success is rooted in its strong ethics and values, as well as the commitment and accessibility of our employees to their clients and communities.

*as of June 30, 2026
**Janney.com/awards-disclosures

EXAMPLES OF OUR SUCCESS

BARRON'S TOP 1,200 STATE BY STATE ADVISORS	CIO 100 AWARD RECIPIENT	COMPUTERWORLD'S 100 BEST PLACES TO WORK IN IT	FORBES BEST MIDSIZE EMPLOYER	FORBES BEST-IN-STATE WEALTH ADVISORS
FORBES BEST-IN-STATE WEALTH MANAGEMENT TEAMS	FORBES TOP NEXT-GEN WEALTH ADVISORS BEST-IN-STATE	FORBES TOP WEALTH MANAGEMENT TEAMS	FORBES TOP WOMEN WEALTH ADVISORS	GREAT PLACE TO WORK® CERTIFIED
BARRON'S TOP 100 WOMEN FINANCIAL ADVISORS	WEALTHMANAGEMENT.COM INDUSTRY AWARD: DIVERSITY, EQUITY AND INCLUSION *Broker/Dealer (fewer than 1,000 advisors)*	WEALTHMANAGEMENT.COM INDUSTRY AWARD: TECHNOLOGY	WEALTHMANAGEMENT.COM INDUSTRY AWARD: TECHNOLOGY AND PRACTICE MANAGEMENT *Broker/Dealer (fewer than 1,000 advisors)*	WEALTHMANAGEMENT.COM INDUSTRY AWARD: FINANCIAL ADVISOR TRANSITION SUPPORT

COMPREHENSIVE ADVICE

Financial advice and services to individuals, families, and business owners:

- Advisory services
- Annuities
- Brokerage Services
- Business Planning
- Cash Management
- Certificates of Deposit
- Corporate Executive Services
- Education Funding Planning
- Equity Selection
- Estate Planning
- Exchange Traded Funds
- Financial Planning
- Fixed Income
- Income Planning
- Investment Strategy
- Insurance
- Mutual Funds
- Unit Investment Trusts
- Retirement Plans
  - *Individual, Small Business & Corporate*
- Trust Services
- Wealth Management

Administration & Operations

- Finance
- Human Resources
- Information Technology
- Learning & Professional Development
- Legal & Compliance
- Marketing & Corporate Communications
- Operations

WORKING WITH JANNEY

Depending on your financial needs and personal preferences, as well as the fees and costs associated with those services, you may opt to engage in a brokerage relationship, an advisory relationship, or a combination of both. Each time you open an account, we will make recommendations on which type of relationship is in your best interest based on the information you provide when you complete or update your client profile.

If you engage in a brokerage relationship, you will buy and sell securities on a transaction basis and pay a commission for these services. Our recommendations for the purchase and sale of securities will be based on what is in your best interest and reflect reasonably available alternatives at that time. If you engage in an advisory relationship, you will pay an asset-based fee, which encompasses, among other things, a defined investment strategy, ongoing monitoring, and performance reporting. Your Financial Advisor will serve in a fiduciary capacity for your advisory relationships.

For more information about Janney, please see Janney's Relationship Summary (Form CRS) on www.janney.com/crs which details all material facts about the scope and terms of our relationship with you and any potential conflicts of interest.

By establishing a relationship with us, we can build a tailored financial plan and make recommendations about solutions that are aligned with your best interest and unique needs, goals, and preferences.

Contact us today to discuss how we can put a plan in place designed to help you reach your financial goals.

Janney Montgomery Scott LLC, its affiliates, and its employees are not in the business of providing tax, regulatory, accounting, or legal advice. These materials and any tax-related statements are not intended or written to be used, and cannot be used or relied upon, by any taxpayer for the purpose of avoiding tax penalties. Any such taxpayer should seek advice based on the taxpayer's particular circumstances from an independent tax advisor.