



FOR IMMEDIATE RELEASE

Gresham Names Five New Partners

CHICAGO, Jan. 31, 2022 – Gresham Partners, LLC, an independent investment and wealth management firm managing over \$8 billion* for select families and family offices located nationally, today announced the selection of five new partners. The new partners have been promoted from within the firm and were selected based on the value they have delivered for clients during their tenure and most recently in a year defined by a global health crisis and unprecedented activity for the firm and its clients.

“This is an exciting moment for our firm. We celebrate what our new partners have accomplished in their careers, for our clients and for Gresham. We take enormous pride in witnessing the growth and development of our people and honoring their contributions with an opportunity to become partners in the firm. I am certain that we have a promising future with these new partners by our side,” said David Salsburg, President.

Added Ted Neild, CEO and Chief Investment Officer, “Independence has been a core value of Gresham since its founding almost 25 years ago, as it allows us to operate the firm in alignment with clients’ best interests, without the interference of outside owners. Gresham’s long-term vision is that we remain independent, owned and run by the next generation. Achieving this goal requires that we identify and develop the next generation of leaders who will eventually succeed the people who are leading the firm today.”

Gresham’s newest partners are:

Joe Richardson For more than 20 years, Joe has excelled at serving the firm’s growing investment platform, clients and client service team and firm owners. Joe manages a team of five professionals executing all aspects of investment operations including tax, legal, audit, administration and banking. In addition, Joe manages and executes the firm’s financial and ownership activities.

Steve Loman Steve has been a member of the investment team for 14 years and has become a key contributor to the marketable strategies team. He plays an active role in our manager search and selection process, where he has become the lead manager on several active manager relationships. Additionally, he assists with partnership portfolio management and external investor communication. He continues to excel as a leader and has built an impressive investor network, elevating Gresham’s name in the institutional investor community.

Amber Stewart Over Amber’s 10 years as a member of the Client Service team, her impact has been seen and felt through her high execution standards, service-oriented spirit and excellence mindset. Amber began her career at Gresham as an Associate and through hard work, dedication, and a desire to serve others, she earned the opportunity to become an Advisor. In addition to the impact Amber has provided to her clients over the years, her contributions to Gresham include the development of a collaborative learning platform, the creation of operational best practices and the mentoring of our Associates.

Justin Gullman Justin has contributed in many significant ways during his eight years at Gresham. Justin began his career at Gresham as an Associate and through his service-oriented spirit, hard work and discipline he progressed in his career to become Advisor. The excellent advice and service he provides to his clients and their family members, the mentorship he provides to Associates and his involvement in various firm projects, including the creation of our SharePoint sites and the integration of DocuSign into our daily lives, have had a lasting impact on our organization.

Amanda DeHaan While Amanda has been at Gresham less than a year, her impact has been immediate and has been felt across the firm broadly with many positive improvements. Amanda brings many years of financial services human resources experience to Gresham and adding Amanda to our partner team will allow her expertise to be felt at an even greater level across the organization as well as on the Operating Committee.

Headquartered in Chicago, Gresham is an independent wealth management firm, fully owned by its senior professionals, serving ultra-high net worth families. Founded nearly 25 years ago, the firm serves as a strategic advisor to clients, offering investment management and wealth planning services.

*AUM as of 9/30/2021