



Wealth Management

2025 ESL IN THE COMMUNITY REPORT

ESL Investment Services

ESL Investment Services now oversees more than \$1.2 billion in assets under management. A team of more than 60 experienced professionals supports this work and brings broad expertise in retirement planning, investment management, estate planning, and more to clients. Central to this activity is a planning process focused on each client’s financial reality. Strategies are built around individual circumstances, priorities, and long-term goals rather than a one-size-fits-all model. This approach helps clients navigate immediate needs while preparing for future milestones.

The image shows the ESL Investment Services logo at the top, featuring the letters 'ESL' in a large, white, serif font with a white arc above it, and 'Investment Services' in a smaller, white, sans-serif font below it. Below the logo, the text 'TOTAL ASSETS UNDER MANAGEMENT¹' is followed by '\$1.2 Billion' in a large, white, serif font. Underneath that, 'TOTAL ASSETS INVESTED' is followed by '\$2.5 Billion' in the same large, white, serif font. At the bottom, the text 'As of December 31, 2025' is written in a smaller, white, sans-serif font.

¹ The advisors with ESL Investment Services manage \$1.2 billion in advisory assets through LPL Financial.

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Alesco Advisors, an ESL Company

Now part of ESL's wealth management entities, Alesco Advisors supports the needs of institutions, high-net-worth families and individuals, and retirement plans with more than \$6 billion in assets under advisement, including more than \$5 billion in assets under management. As an experienced outsourced chief investment officer (OCIO), Alesco provides tailored and comprehensive investment solutions that reflect the distinct missions and priorities of corporate and nonprofit clients. This approach includes strategic guidance to help organizations manage assets effectively and plan for long-term stability.



TOTAL ASSETS UNDER MANAGEMENT

\$5 Billion

ASSETS UNDER ADVISEMENT

\$6 Billion

As of December 31, 2025

Cooper/Haims Advisors, an ESL Company

Cooper/Haims Advisors strives to deliver an elevated client experience shaped around each client's unique needs and long-term vision. The team serves clients across the country and brings decades of experience and strategic insight to every relationship. We provide fee-based, personalized financial advice tailored to complex financial situations. Our services include investment management, retirement planning, tax planning and compliance, estate planning, employee benefits analysis, insurance planning, and education planning. Together, these capabilities create a comprehensive planning framework that supports stability today and clarity for the future. In total, the Cooper/Haims Advisors team supports more than \$1.1 billion in assets under management.



COOPER / HAIMS
ADVISORS

AN ESL COMPANY

TOTAL ASSETS UNDER MANAGEMENT
\$1.1 Billion

As of December 31, 2025

ESL Trust Services

ESL Trust Services delivers core trust and estate planning support, along with estate planning support that helps individuals protect their legacies and navigate complex wealth-transfer needs. The team provides professional fiduciary services, including trustee and executor responsibilities, and investment and administrative support for families, foundations, and nonprofits, along with estate planning guidance. These services create stability and confidence during times of transition. Personal assets are managed and cared for with compassion, efficiency, accuracy, and long-term interests in mind.

ESL TRUST
SERVICES

TOTAL ASSETS UNDER MANAGEMENT

\$629 Million

As of December 31, 2025