CORIENT

Art Management Services

September 2025

Introduction

- On September 2nd, 2025, Corient announced the addition of Stonehage Fleming and Stanhope Capital – two leading International Wealth Management business focused on ultra-high and high-net-worth clients.

- Upon closing of the transactions, Corient will become the world's largest non-bank wealth manager and world's largest multi-family office focused on ultra-high and high-net-worth clients managing ~$430 billion in assets and operating in over 20 countries*.

- Stonehage Fleming brings to Corient many great capabilities, including a robust Art Management offering that is not currently available to our clients.

- Given the inbound demand following the announcement, we have decided to extend the Art Management services to Corient clients between signing and closing.

- Stonehage Fleming's Art Management experts will work directly with your family on the day-to-day collection management (cataloging, exhibition, conservation, insurance), long-term strategic planning, purchases and sales oversight, and more.

*Corient client assets are as of July 31, 2025, and reflect the aggregate assets of Corient Holdings Inc. ("Holdings"), Corient Private Wealth LLC's upstream U.S. holding company. Client assets include the assets in which Holdings has a majority or minority investment and signed, but not yet closed transactions in the U.S. Certain assets are not considered Regulatory Assets Under Management, as defined by the SEC and reported in Corient Private Wealth LLC's Form ADV. Stonehage Fleming assets are as of December 31, 2024; Stanhope Capital Group assets are as of July 31, 2025.

Stonehage Fleming Art Management Identity

WHO

- Team based in London and Zurich, with collectively over 50 years' experience working with trustees, collectors, auction houses, museums and art galleries across the globe
- Generalists with an extensive international network across the art world
- We take pride in working with the same clients for decades and across generations, but we welcome younger generations of collectors

HOW

- We are interested in the lifecycle of a collection and always place the artwork first
- We take time to know the physical aspects of each artwork under our care and the attention it requires
- We believe in quality over quantity and treat with the same care an artwork, regardless of its market value

WHY

- The growing value of art means collections now represent a significantly larger share of a collector's overall wealth than originally anticipated
- For our clients, managing risk extends beyond financial considerations to include the preservation of family legacy, cultural identity, and social capital
- We understand the factors that influence value and offer peace of mind to collectors, trustees, and Relationship Managers alike

PLEASE REFER TO CONTENT DISCLOSURES AT THE END OF THIS PRESENTATION.

Stonehage Fleming Art Management Key Facts

From antiquities to contemporary art to everything else in between.

LAUNCHED IN 2007

Merged in 2017 with OmniArte (an international art advisory of over 15 years)

$2.5 BILLION OF ASSETS

Value of collections under management

INTERNATIONAL CLIENT BASE

Spanning 1st-7th generation art collectors

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Stonehage Fleming Art Management Services

Knowledge, experience and independence are at the heart of our offering.

ART MANAGEMENT

Collection Management

- Stonehage Fleming works with different types of families and collections, and its clients benefit from that varied experience
- They manage the operational and administrative aspects of collections, from cataloguing and logistics to insurance and exhibition planning

Strategic Planning

- They analyze and provide strategies for the future, considering the fiscal and legal aspects of each
- And develop long-term strategic plans that align a collection's purpose with the client's personal, philanthropic, and legacy goals

ART ADVISORY

Acquisitions

- The team can vet works for purchase, analyze their fit within the collection and do not accept fees from third parties
- They also oversee the entire acquisition process, ensuring each step from sourcing to legal review is aligned with the client's goals

Sales

- The team selects the best strategy for each individual work and do not accept fees from third parties
- They identify what they deem the most suitable sales channels for each work, balancing visibility, discretion, and market timing to optimize outcomes

STONEHAGE FLEMING
ART MANAGEMENT SERVICES

Collection Management

The Stonehage Fleming team works with different types of families and collections, and clients benefit from that varied experience.

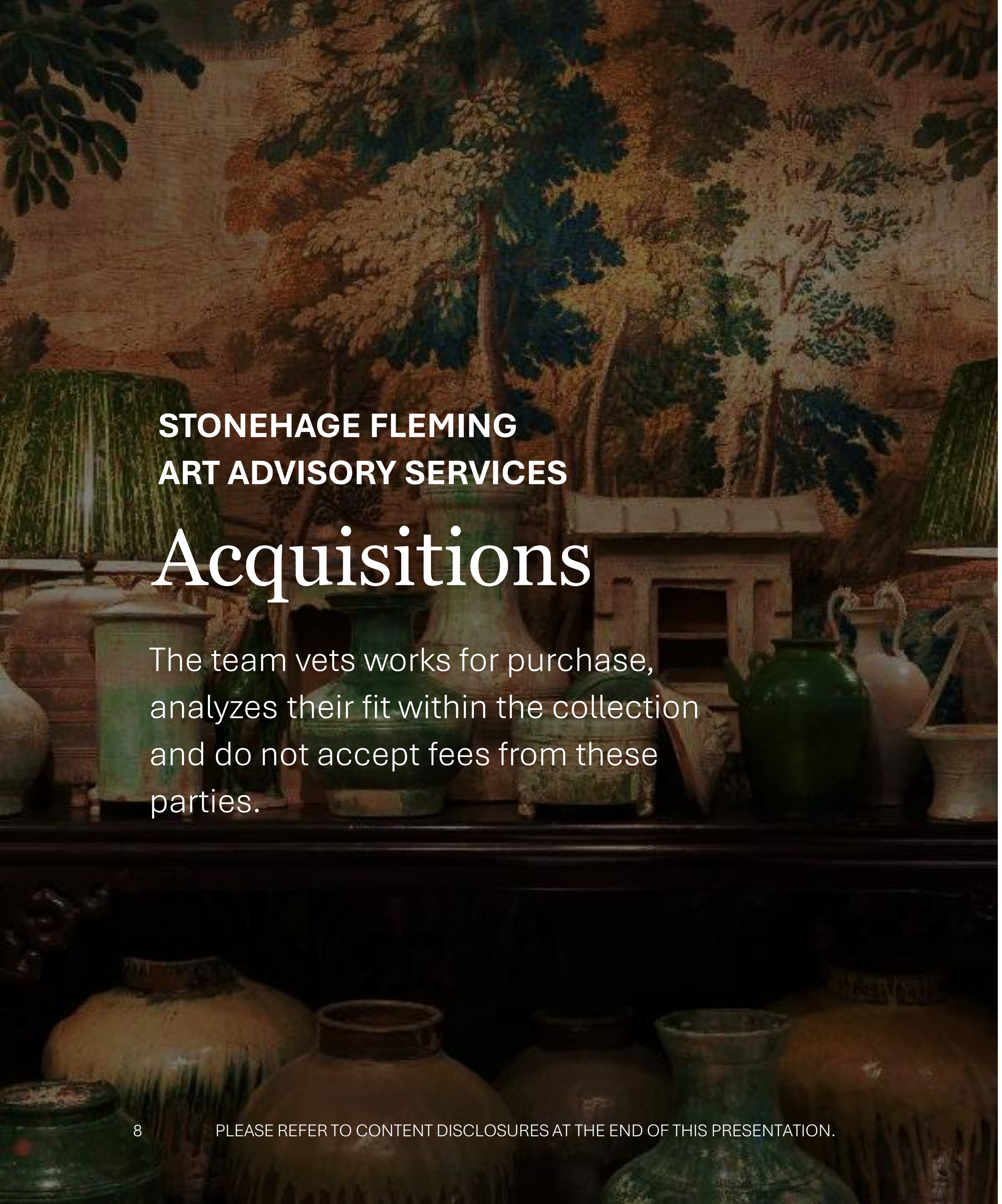
- Management of online collection databases
- Cataloging services and archive review research and due diligence
- Organization and review of collections' valuations
- Planning and coordination of logistics and customs formalities
- Organization and supervision of artworks installations, lighting, and framing
- Management of short and long-term loans, donations, and bequests
- Organization and management of exhibitions
- Regular review and monitoring of artworks' condition
- Organization and supervision of conservation treatments
- Selection of insurance and insurance administration
- Management and coordination of general administration (purchases and payments)
- Coordination with legal teams and client representatives
- End-to-end management of all related processes

STONEHAGE FLEMING
ART MANAGEMENT SERVICES

Strategic Planning

The team analyzes and provides strategies for the future, considering the fiscal and legal aspects of each option.

- Working in partnership with clients to help realize their vision for their collection
- Succession planning and structuring of collections, in collaboration with our legal team or that of the client
- Long-term conservation strategies
- Creation of collections' manuals for the long-term benefit of a collection
- Exhibition strategies (long- and short-term loans)
- Philanthropy



STONEHAGE FLEMING
ART ADVISORY SERVICES

Acquisitions

The team vets works for purchase, analyzes their fit within the collection and do not accept fees from these parties.

- Discuss with client works submitted by third parties
- Advise on pricing and negotiation
- Due diligence for artworks prior to purchase
- Regular market research updates
- Arrange and attend meetings with relevant parties
- Review of purchase agreements
- Submission of auction bids
- End to end management of all related processes
- Sourcing of artworks
- Coordination with legal teams and client representatives

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STONEHAGE FLEMING
ART ADVISORY SERVICES

Sales

The team selects what they deem the best strategy for each individual work and do not accept fees from third parties.

- Confidential and independent advice and support
- Review and analysis of third parties' sales proposals
- Sale strategies and end to end management of all related processes
- Review of consignment agreements
- Negotiation of the commercial terms of agreed sales arrangements

CORIENT

Stonehage Fleming Art Management Network

We are the intersection between our clients and our network, creating one central point of contact.

OUR CLIENTS

- Collectors
- Foundations
- Trusts
- Family Offices
- Wealth Advisors

ART MANAGEMENT TEAM

OUR NETWORK

- Art dealers & galleries
- Auction Houses
- Museums
- Curators
- Lighting designers
- Publishers
- Conservators
- Logistics companies
- Insurers, Advisors, Lawyers

Stonehage Fleming Art Management Team

Maria De Peverelli
Executive Chairman,
Art Management

Maria is a Partner and Executive Chairman of Stonehage Fleming Art Management, serving a client base that includes individuals, family offices, foundations, trusts and estates. Maria joined the group in 2017 when OmniArte, a Zurich based art management and advisory business which she founded in 2005, merged with Stonehage Fleming. Maria has also been a Trustee of the Yorkshire Sculpture Park and the Estorick Collection in London and served as a member of the board of Advisors of the Fondazione Palazzo Strozzi, in Florence. She is external head of collections at Holkham Hall, Norfolk, a member of APAA (Association of Professional Art Advisors), and serves on the board of the Fondation Marcello, Givisiez-Fribourg, and FAI UK (the Italian National Trust). She is a frequent lecturer at the Sotheby's Institute.

Prior to establishing OmniArte, Maria was gallery Director of the Villa Favorita in Lugano (Thyssen- Bornemisza collection), has organized exhibitions for the Museum of Applied Arts in Frankfurt, has spent a year in the decorative arts department at the Getty, and has taught museum management at the University of Genoa

Stonehage Fleming Team Members:

Rubina Romanelli
Art Advisor and
Senior Collection Manager,
Art Management

Anna Smith
Senior Collection Manager,
Art Management

Denise Morax
Associate Director,
Art Management

Sandra Nikusev
Assistant Collection Manager,
Art Management

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This presentation includes forward-looking statements regarding services and capabilities that are expected to be available at Corient following the completion of Corient' s proposed acquisitions of Stonehage Fleming. These statements are subject to risks and uncertainties, and there is no guarantee that the acquisition will be completed as anticipated or that the described services described will be offered in the manner or timeframe presented. Upon the completion of Corient's acquisition of Stonehage Fleming, the Art Management Services discussed herein will be offered through Corient Family Office LLC. Until the transaction is final, Corient and Stonehage Fleming will continue to operate as separate entities. This proposed acquisition creates a conflict of interest because it incentivizes Corient to promote Stonehage Fleming's services. No client is obligated to retain or engage any external professional service provider.

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Investing in nonfinancial assets, including fine art, is complex in nature and involves significant risk due to market volatility, limited liquidity, and the speculative nature of these assets. Art investments also carry unique risks such as high storage costs, lack of income generation, authenticity concerns, and minimal regulatory oversight, among other risks. Special risk considerations include natural events, complex tax considerations and lack of liquidity. Nonfinancial assets may not be suitable for all investors. Total loss of value is possible.

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Diversification, allocation and rebalancing strategies do not imply you will make a profit and does not protect against losses. The future performance of any investment or wealth management strategy, including those recommended by us, may not be profitable or suitable or prove successful.

Different types of investments involve degrees of risk, including potential loss of principal. The future performance of any investment or wealth management strategy, including those recommended by us, may not be profitable or suitable or prove successful. Past performance is not indicative of future results. One cannot invest directly in an index or benchmark, and those do not reflect the deduction of various fees that would diminish results. Any index or benchmark performance figures are for comparison purposes only, and client account holdings will not directly correspond to any such data.

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