

July 28, 2025



Silvercrest Asset Management Group Appoints Jeffrey C. Allen and Alexander I. Waldorf as Co-Portfolio Managers for the U.S. Value Equity Team

NEW YORK, July 28, 2025 (GLOBE NEWSWIRE) -- Silvercrest Asset Management Group Inc. (NASDAQ: SAMG) is pleased to announce the promotion of Jeffrey C. Allen, CFA, and Alexander I. Waldorf, CFA, to Co-Portfolio Managers for the U.S. Value Equity Team. They will work alongside Roger Vogel, the Lead Portfolio Manager of the team and a Silvercrest founder. Mr. Vogel plans to transition from his role as Lead Portfolio Manager to Senior Advisor in the spring of 2027.

Mr. Vogel said, "While I plan to remain fully engaged through the spring of 2027, it is important for our clients to build deeper relationships with Jeff and Alex. For years, they've been instrumental to our team's investment success, and I am confident they will continue to excel as they assume the lead for the portfolios."

Richard R. Hough III, Silvercrest's Chairman & Chief Executive Officer, stated, "Silvercrest prides itself on executing a long-term strategic vision which includes careful succession planning. In addition to being a world-class portfolio manager, Roger has been a tremendous leader and mentor, developing our next generation of talent."

Mr. Vogel continued, "Jeff and I have worked together since our time at Donaldson, Lufkin & Jenrette, and he accompanied me and the team when we joined Silvercrest at its founding in 2002. He is a consummate professional analyst and has proven himself to be one of our most successful stock selectors. Alex joined our team in 2013 from a multibillion-dollar hedge fund and quickly established himself as a talented generalist analyst across multiple sectors. He is also a strong communicator amongst our team and with clients, making him and Jeff an excellent team to lead our future efforts".

About Jeffrey C. Allen, CFA

Jeffrey C. Allen, CFA, is a Managing Director and Co-Portfolio Manager for the firm's domestic value equity capabilities and the firm's MLP portfolio. Prior to Silvercrest, Mr. Allen was a Vice President at Credit Suisse Asset Management, where he was the analyst for the small cap product. He arrived at Credit Suisse as a result of that firm's merger with DLJ, where he had worked since 1999 as a generalist equity analyst in DLJ Asset Management's large cap and small cap value equity areas. Previously, he worked in the corporate finance division of J.P. Morgan Chase & Co. He received a B.S. in business administration from Villanova University in 1990 and an MBA in finance from New York University in 1997. He is

a CFA charterholder and member of the New York Society of Security Analysts.

About Alexander I. Waldorf, CFA

Alexander I. Waldorf, CFA, is a Managing Director and Co-Portfolio Manager for the firm's domestic value equity capabilities and the firm's MLP portfolio. Prior to Silvercrest, Mr. Waldorf was an Investment Analyst at Ascend Capital, a multibillion-dollar long/short equity hedge fund where he covered the industrial, chemical, energy, and technology sectors. Previously, he worked as an Analyst within Citigroup's Corporate and Investment Bank, where he was responsible for advisory work on financing solutions for consumer, retail, and agribusiness companies. Mr. Waldorf graduated *magna cum laude* from Georgetown University, receiving a B.S. in Business Administration with double majors in Finance and International Business. He is a CFA charterholder and member of the New York Society of Security Analysts.

About Silvercrest Asset Management

Silvercrest was founded in April 2002 as an independent, employee-owned registered investment adviser. With offices in New York, Boston, Virginia, Atlanta, New Jersey, California, and Wisconsin, Silvercrest provides traditional and alternative investment advisory and family office services to wealthy families and select institutional investors. As of March 31, 2025, the firm reported assets under management of \$35.3 billion.

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