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## **Subject: Exciting Updates from CPC**

Greetings,

As we celebrate CPC's 50th anniversary this year, I find myself reflecting with deep gratitude on the legacy, relationships, and shared milestones that have brought us to this moment. For half a century, our firm has stood for thoughtful advice, enduring relationships, and a relentless commitment to serving families and business owners with integrity and care.

It is in that same spirit that I write to share an important and exciting update.

As many of you know Mike Hines is currently the majority shareholder of our firm. After years of careful planning and preparation, we have completed a comprehensive succession plan designed to ensure the long-term strength, stability, and continuity of our firm. On September 30th, 2025, CPC will transition to a new ownership structure. At that time, CPC will become wholly owned by a newly formed holding company, with majority ownership held by myself, Blake Flood, and Adele Gipson. In addition, some of our senior team members will also become owners, further deepening our culture of shared stewardship and long-term alignment.

While this marks an important milestone in our firm's history, one thing remains unchanged: our unwavering commitment to you. The same team, same values, and same client-first philosophy will continue to guide every decision we make.

Because industry regulations consider this transition a change of control, it constitutes an assignment of your investment advisory agreements with CPC. You don't need to take any action for your relationship with us to continue seamlessly. That said, you do have the right to object by notifying us in writing within thirty (30) days of receiving this letter. We are humbled by the trust you have placed in us over the years. This succession plan was built precisely to honor that trust and to position us for the next 50 years of service, innovation, and client care.

It is truly a privilege to lead our firm into its next chapter. Working together, we look forward to continuing to deliver the highest caliber of investment advice, personalized guidance, and advocacy on your behalf. Thank you for being an essential part of the CPC family.

With gratitude and respect,

A handwritten signature in blue ink that reads 'Varun K. Marneni'.