



COMPASS CAPITAL UPDATE: A PROMOTION AND PUBLISHED RECOGNITION

One of the many strengths of Compass Capital is the depth of our team. Over the past several years we have invested in building an even deeper team of professionals by working to identify and grow our next generation of talent.

One of these talented individuals is Chris Nuth, CFA. Chris joined Compass in 2017 as a part-time Client Relations and Operations (CRO) team member while he was finishing his undergraduate degree in Finance and Economics at Augsburg University. In the course of the past 7 years, Chris was promoted from our CRO team to the role of portfolio manager. His promotion to portfolio manager included a place on our investment committee as a contributing member, where he learned our unique and disciplined investment approach. During this time, he was studying for the Chartered Financial Analyst (CFA) designation, which he earned through a series of three consecutive exams along with relevant work experience. In 2020, he completed this program and earned the CFA designation. Throughout his time on our investment committee, Chris has shown a strong attention to detail and an authentic desire to learn everything possible about a company under his gaze. We are pleased to announce that these qualities have earned Chris a

well-deserved promotion to become a voting member of our investment committee. Please join us in congratulating Chris on his latest accomplishment!

Our firm is also excited to share the news that we have been recognized by *Barron's* magazine. *Barron's* is one of the world's premier investing publications, and we are honored that they ranked us in the top five of all investment advisory firms in the State of Minnesota for 2024 in their publication released on March 11, 2024. This award is a testament to our team's hard work, dedication, and commitment to excellence. The ranking by *Barron's* is based on meticulous criteria, drawing from data provided by approximately 6,000 of the nation's most productive investment advisors over the period of 09/30/2022 to 09/30/2023. Aspects of Compass that were considered include quality of practice, regulatory record, assets under management, and philanthropic endeavors. We are immensely proud of this accomplishment and are steadfastly dedicated to providing exceptional service and guidance to our clients. Compass would like to express our gratitude to *Barron's* for this honor, and also to express our gratitude to our clients for entrusting their financial well-being with us.

BARRON'S
ADVISOR

Top 1200
Financial Advisors
2024



FIRM

INVESTMENT COMMITTEE

Leigh Niebuhr
Mark Halverson
Jay Jackley, CIMA
Mark Vitelli, CFA
Christopher Kelley, CFA, CAIA
Christopher Nuth, CFA

AUM

\$2.0 billion

INCEPTION

1988

COMPASS PHILOSOPHY

As an independently-owned firm, Compass provides customized investment services to individuals, foundations/endowments, trusts, and retirement plans. Our objective is to preserve and enhance the real purchasing power of our clients' wealth over time.

Our clients value working directly with a seasoned and experienced team of portfolio managers to help them navigate their investments relating to:

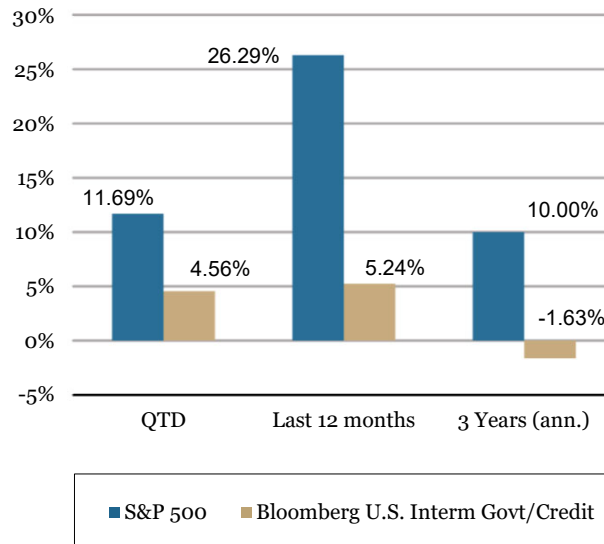
- Building a quality portfolio
- Divorce
- Retirement
- Inheritance
- Sale of a business
- Trust distribution

Our experienced team is always available to provide financial advice and review your financial assets.

This commentary contains the current opinions of Compass Capital Management, Inc., an SEC-registered investment adviser. Such opinions are subject to change without notice as economic and market conditions warrant. This commentary is for general educational purposes only and should not be considered as personalized investment advice or a recommendation of any particular security, strategy or investment product. Certain information contained herein is derived from third-party sources and is believed to be reliable at the time of publication, but is not guaranteed as to accuracy or completeness. Historical performance shall not be relied upon as a predictor of future performance.

MARKET INDICES

Total Return as of 12/31/2023



For more information regarding our company or results, please contact us at investors@compasscap.com.