



### D.A. Davidson Expands Trust Company



D.A. Davidson Trust Company has announced its expansion into Nebraska with the opening of two new offices in Lincoln and Omaha and the hiring of Morgan Davis as Vice President, Trust Officer. Morgan will be responsible for working with clients to develop, implement, and strengthen trusts and estate plans personalized to their unique circumstances. He will deliver personalized services and solutions that include goal identification, long-term plan administration, and integrating wealth management strategies.

Morgan brings a solid background in trust administration, with extensive knowledge and strong relationships honed from his years of experience, to serve our Nebraska clients. He is a strong addition to our team as our firm continues growing its presence to serve more clients throughout the Midwest.

### D.A. Davidson in the News



#### Equity Capital Markets

Recently, D.A. Davidson announced record growth and expansion of the Equity Capital Markets division in 2018.

#### Wealth Management

Our Wealth Management Group continues to expand and opened new branches in Colorado and Ohio during 2018, with further growth planned in the New Year.

#### Investment Banking

D.A. Davidson's Investment Banking Group recorded a record year, completing 92 transactions totaling \$6.8 billion. The second largest transaction completed in firm history took place in Nebraska and was sourced by our very own John Decker.

### D.A. Davidson Earns Notable M&A Awards, Named USA Investment Bank of the Year, Middle Markets 2018

The Global M&A Network, named D.A. Davidson & Co. USA Investment Bank of the Year, at the 10th Annual Americas M&A Atlas Awards. D.A. Davidson also earned three additional awards for transactions completed by the firm in 2018:

- Americas Bank M&A Deal of the Year, Americas M&A Atlas Awards
- Americas Food & Beverage M&A Deal of the Year, Americas M&A Atlas Awards
- Consumer Discretionary Deal of the Year Award, from The M&A Advisor

### 2018 Year-End Summary



#### Pinnacle Bank Championship

The Pinnacle Bank Championship presented by Heartland Chevy Dealers was held at The Club at Indian Creek in Omaha last July. The inaugural success of the Pinnacle Bank Championship has resulted in over \$25,000 in donations to the TeamMates Mentoring Program, founded by Tom and Nancy Osborne.

D.A. Davidson has sponsored Scott Gutschewski, an Omaha Native, for the past three seasons and we are pleased to announce that we'll sponsor him again in 2019! Scott played college golf at both Creighton University and the University of Nebraska and then turned professional after graduating from Nebraska. Follow Scott on his Twitter for career updates.



#### Raikes Philanthropy Event

In September, Jeff Raikes and Nadia Roumani of Stanford Effective Philanthropy Learning Initiative presented: "Advisors Challenge: Increasing Philanthropic Impact," at Happy Hollow Club. Raikes is the co-founder of the Raikes Foundation. In 2014, he retired from his role as Chief Executive Officer of The Bill & Melinda Gates Foundation. Currently, he serves on the board of Giving Tech Labs, Hudl, Costco, The Jeffery S. Raikes School of Computer Sciences and Management at The University of Nebraska Lincoln, and The Microsoft Alumni Network.

#### Community Day of Caring

We have long invested in and encouraged associate involvement within our local communities. In addition to advocating for volunteerism, we believe in taking our commitment further — enhancing our employees' generosity by matching their charitable donations to eligible organizations.

Through D.A. Davidson's Gift Matching Program, the firm matches volunteer hours and cash contributions made by each of our employees. A majority of our employees took advantage of the program in 2018. Anticipating our employees' enthusiastic charitable involvement in the coming year, we are increasing the total dollars available for gift matching to ensure that the firm's financial contributions are as generous as our employees'.



2018 marked the continuation of a D.A. Davidson annual tradition started the prior year — our company-wide day of giving. On D.A. Davidson Day, associates across the nation come together to serve their communities and actively live out our core value of caring. The event involved a week of collaborative service opportunities ensuring multiple locations, diverse employee interests, and organizations could be served. Local D.A. Davidson associates nominated and selected various nonprofit groups. These groups represented a mix of philanthropic interests including: animal shelters, senior services, food banks, homeless

shelters, and youth groups.

In both 2017 and 2018, volunteers wore D.A. Davidson Day t-shirt displaying the firm's logo inside a heart — a symbolic reminder of the caring aspect of their service.

As a company known for its focus on social responsibility and philanthropy, this new event is a strong addition to our extensive list of programs and initiatives that benefit nonprofits. We look forward to celebrating our annual D.A. Davidson Day in years to come!

During the week, Lincoln, Columbus, and Omaha branches volunteered in their communities to make a positive impact for many individuals who are less fortunate. A summary of their amazing 2017 contributions follows.

#### Lincoln

- Matt Talbot Kitchen & Outreach - Volunteers helped serve lunch to guests of the center.
- Child Advocacy Center - Volunteers helped the group prepare for their Harvest of Hope event taking place the following week. This included silent auction preparation, décor assembly, registration program assistance, etc.
- Community Action Partnership of Lancaster and Saunders Counties - Volunteers assisted health coordinators complete health screenings for enrolled children ages 6 weeks to 5-years-old.



#### Columbus

- The Center for Survivors - Associates worked together to repair several Little Free Library boxes, touching up the boxes with a coat of new paint.

#### Omaha

- Together Inc. - Volunteers assisted the food pantry by organizing donated items.
- Youth Emergency Services (YES) - Volunteers helped sort and organize the food pantry and also helped with food prep in the Outreach Center.



#### Donations

Just as we work to improve our client's financial well-being, we also work to strengthen local communities. Giving back is one of our core values. Learn more by reading our recent giving report.



Education



Human Services and Community Development



Arts & Culture

#### Staff Team Building

Just as we work to improve our clients' financial well-being, D.A. Davidson & Co. also works to strengthen local communities. We donate to a broad spectrum of philanthropic organizations and causes, with the goal of improving lives while bringing hope and comfort to those who need it most. Each year we designate a significant portion of our firm's pretax profits to supporting nonprofit organizations. We believe we can create the most impact by focusing our giving on three specific areas that reflect the needs in our communities.

As part of our staff team building, the Omaha office hosted a fundraiser where employee-created paintings were auctioned. The employee whose painting generated the most revenue got to choose the organization throughout the proceeds. Over \$4,660 was raised and donated to a number of organizations throughout the Lincoln and Omaha communities.