



March 12, 2020

Dear Clients and Friends,

At SlateStone Wealth, the health and safety of our clients, employees, and business partners is a top priority as is providing a high-level continuation of our services in times of uncertainty.

Amid the growing concerns over the spread of the novel coronavirus (COVID-19), we are taking additional steps to be extra vigilant. This is an evolving situation and we are monitoring it closely to ensure all proper precautions are being taken and business continuity procedures are in place to ensure the ongoing support of our clients and services.

SlateStone Wealth has well-developed preparedness plans that cover a range of issues that could possibly disrupt normal business operations. Our Business Continuity Plan addresses how we operate under extreme circumstances and how we will deal with the possibility of disruptions to maintain operations and support of our clients. Over recent days, we have reviewed and are updating our existing plans to incorporate additional strategies related to the COVID-19 disruptions that may occur. We will utilize a variety of strategies which include remote working capabilities, transferring staff / work to less-affected locations, social distancing, guidelines or restrictions on business travel, and reallocating resources and technology to support our most critical, customer-facing processes. The goal of implementing these procedures is to ensure ongoing communication with our clients, portfolio management and trading, cashiering & maintenance, compliance, finance and business operations are supported in the event of disruptions resulting from the spread of COVID-19.

Our preparations also include practical steps to reduce health risks for our employees and our community of clients and business partners. We have also taken steps to assess the preparedness plans of our primary custodians and critical third-party vendors. In addition, our technology systems are set up to support internal and external communications, secure data transmission, and processing actions and trades for our clients.

As your financial advisor, we remain calm and focused as we oversee your wealth. As always, we will continue to act in your best interest based on our interpretation of the facts available to us and our understanding of your personal investment objectives and risk tolerances. In addition, we will continue to follow best practices of our industry with the utmost concern for our clients and employees. While we remain confident of our plan, in the event of significant issues impacting SlateStone, we will post a formal communication to our website [www.slatestone.com](http://www.slatestone.com).

Sherri A. Daniels  
*Co-Founder, Managing Partner*