

Logan Capital Management, Inc.

Form ADV Part 2B Brochure Supplement

March 25, 2025

**3817 West Chester Pike
Newtown Square, PA 19073**

215-569-1100

www.LoganCapital.com

This brochure supplement provides information about the personnel of Logan Capital Management, Inc. ("Logan Capital") listed in the index below. This document supplements the Logan Capital brochure. If you have any questions about the contents of this brochure supplement, please contact Mary T. Evans, CCO at 215-569-1100, or mtevens@logancapital.com. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission ("SEC") or by any state securities authority.

Additional information about Logan Capital is available at the SEC's website at www.adviserinfo.sec.gov. Additional information about the personnel of Logan Capital described in this brochure supplement may also be available on the SEC's website at www.adviserinfo.sec.gov.

Delivery

Material Changes

ADV Part 2B Updates:

We may, at any time, update this brochure supplement and either send you a copy or offer to do so (through electronic means (i.e., email) or in hard copy form).

If you would like another copy of this brochure supplement, please download our entire ADV Part 2 from the SEC Website as indicated above or you may contact our Chief Compliance Officer, Mary T. Evans, CCO, at 215-569-1100, or mevans@logancapital.com.

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Al Besse
Principal
President
Portfolio Manager

Item 2 - Educational Background and Business Experience

Year of Birth: 1957

Education:

- Haverford College (BA, 1979)
- Wharton School, University of Pennsylvania (MBA, 1982)

Business Background:

- Vice President – Investments, First Fidelity Bank, May 1984 to February 1994

Item 3 – Disciplinary Information

Al Besse has never had any disciplinary disclosures to be reported.

Item 4 – Other Business Activities

Al Besse is currently not actively engaged in any other investment related business or occupation.

Item 5 – Additional Compensation

Al Besse receives compensation from Logan Capital Management, Inc. from his responsibilities as Principal and President, and for providing advisory services to clients. Mr. Besse does not receive any other economic benefit for providing advisory services.

Item 6 – Supervision

Al Besse is a member of, and reports directly to, the Logan Capital Management, Inc. Executive Committee. His activities are also monitored by Logan Capital's Chief Compliance Officer, Mary T. Evans. Ms. Evans can be reached at 215-569-1100.



Dana H. Stewardson

Principal
Secretary
Portfolio Manager

Item 2 - Educational Background and Business Experience

Year of Birth: 1961

Education:

- Ohio Wesleyan University (BA, 1984)

Business Background:

- Registered Rep., National Securities Corporation, February 1995 to 2017
- Director and Managing Dir., Mercer Capital Management, Inc., April 1992 to February 1994
- Registered Rep., Edward C. Rorer & Co., Inc., November 1991 to January 1993
- Registered Rep., The Pennsylvania. Group, Inc., February 1990 to November 1991
- Registered Rep., Pennsylvania. Merchant Group, February 1987 to February 1990
- Registered Rep., Kidder Peabody and Co., Inc., September 1984 to February 1987

Item 3 - Disciplinary Information

Dana H. Stewardson has never had any disciplinary disclosures to be reported.

Item 4 - Other Business Activities

Dana H. Stewardson is currently not actively engaged in any other investment related business or occupation.

Item 5 - Additional Compensation

Dana H. Stewardson receives compensation from Logan Capital Management, Inc. from his responsibilities as Principal and Secretary, and for providing advisory services to clients. Mr. Stewardson does not receive any other economic benefit for providing advisory services.

Item 6 - Supervision

Dana H. Stewardson is a member of, and reports directly to, the Logan Capital Management, Inc. Executive Committee, which is headed by Al Besse. His activities are also monitored by Logan Capital's Chief Compliance Officer, Mary T. Evans. They can be reached at 215-569-1100.



Stephen S. Lee

Principal
Treasurer
Portfolio Manager

Item 2 - Educational Background and Business Experience

Year of Birth: 1967

Education:

- Lehigh University (BS, Accounting, 1990)

Business Background:

- Registered Representative, National Securities Corporation, February 1995 to present
- Registered Representative, Mercer Securities, Ltd., December 1991 to February 1995
- Vice President, Mercer Capital Management, Inc., September 1992 to January 1994
- Registered Representative, Merrill Lynch, September 1991 to September 1992

Item 3 - Disciplinary Information

Stephen S. Lee has never had any disciplinary disclosures to be reported.

Item 4 - Other Business Activities

Stephen S. Lee is currently not actively engaged in any other investment related business or occupation.

Item 5 - Additional Compensation

Stephen S. Lee receives compensation from Logan Capital Management, Inc. from his responsibilities as Principal and Treasurer, and for providing advisory services to clients. Mr. Lee does not receive any other economic benefit for providing advisory services.

Item 6 - Supervision

Stephen S. Lee is a member of, and reports directly to, the Logan Capital Management, Inc. Executive Committee, which is headed by Al Besse. His activities are also monitored by Logan Capital's Chief Compliance Officer, Mary T. Evans. They can be reached at 215-569-1100



William T. Fitzpatrick, CFA

Managing Director

Portfolio Manager

Item 2 - Educational Background and Business Experience

Year of Birth: 1974

Education:

- Villanova University (BS in Business Administration, 1997)
- University of Notre Dame (MBA, 2003)

Business Background:

- Analyst, Manulife Asset Management, February 2011 to January 2019
- Analyst, Optique Capital, February 2007 to February 2011
- Analyst, Johnson Asset Management, November 2004 to February 2007

Item 3 – Disciplinary Information

William T. Fitzpatrick has never had any disciplinary disclosures to be reported.

Item 4 – Other Business Activities

William T. Fitzpatrick is currently not actively engaged in any other investment related business or occupation.

Item 5 – Additional Compensation

William T. Fitzpatrick receives compensation from Logan Capital Management, Inc. from his responsibilities as Managing Director, and for providing advisory services to clients. Mr. Fitzpatrick does not receive any other economic benefit for providing advisory services.

Item 6 – Supervision

William Fitzpatrick reports directly to the Logan Capital Management, Inc. Executive Committee which is headed by Al Besse. Mr. Besse can be reached at 215-569-1100.



Daniel R. Gruemmer, CFA

Managing Director

Portfolio Manager

Item 2 - Educational Background and Business Experience

Year of Birth: 1982

Education:

- Iowa State University (BS, Aerospace Engineering, 2004)
- Washington University, St. Louis (MS, Aerospace Engineering, 2006)
- University of Chicago Booth School of Business (MBA, 2009)

Business Background:

- Self-employed Investor, June 2019 to August 2022
- Portfolio Manager, American Century Investments, February 2015 to June 2019
- Analyst/Sr. Analyst, American Century Investments, July 2009 to February 2015
- Aerodynamics Engineer, The Boeing Company, May 2004 to August 2007

Item 3 – Disciplinary Information

Daniel R. Gruemmer has never had any disciplinary disclosures to be reported.

Item 4 – Other Business Activities

Daniel R. Gruemmer is currently not actively engaged in any other investment related business or occupation.

Item 5 – Additional Compensation

Daniel R. Gruemmer receives compensation from Logan Capital Management, Inc. from his responsibilities as Managing Director, and for providing advisory services to clients. Mr. Gruemmer does not receive any other economic benefit for providing advisory services.

Item 6 – Supervision

Daniel R. Gruemmer reports directly to the Logan Capital Management, Inc. Executive Committee which is headed by Al Besse. Mr. Besse can be reached at 215-569-1100.



Mary T. Evans

Chief Compliance Officer
Chief Operating Officer

Item 2 - Educational Background and Business Experience

Year of Birth: 1958

Education:

- Wheaton College (BA, Biology, 1980)

Business Background:

- Director, Portfolio Admin., Philadelphia Int'l Advisors, January 2002 to October 2004
- Director, Institutional Portfolio Admin., Glenmede, September 1996 to January 2002
- Manager Portfolio Admin., LTCB-MAS Inv. Mgmt., Inc., September 1988 to September 1996

Item 3 - Disciplinary Information

Mary T. Evans has never had any disciplinary disclosures to be reported.

Item 4 - Other Business Activities

Mary T. Evans is currently not actively engaged in any other investment related business or occupation.

Item 5 - Additional Compensation

Mary T. Evans receives compensation from Logan Capital Management, Inc. from her responsibilities as Chief Operating Officer, and Chief Compliance Officer.

Item 6 - Supervision

Mary T. Evans is a member of, and reports directly to, the Logan Capital Management, Inc. Executive Committee, which is headed by Al Besse. Mr. Besse can be reached at 215-569-1100.



Christopher M. Travers
Managing Director
National Sales and Business Development

Item 2 - Educational Background and Business Experience

Year of Birth: 1962

Education:

- Syracuse University (BA, History, 1986)

Business Background:

- Director - Managed Accounts, Logan Capital Management, January 2016 to May 2017
- Managing Director, Head of Financial Institutions Group, Rothschild Asset Management, Inc. April 2002 to August 2015
- Vice President, Ashland Management Incorporated, August 1999 to March 2002
- Vice President, Director of Investment Management Consulting Services, Deutsche Bank, November 1993 to August 1999
- Assistant Vice President, Alliance Capital, October 1989 to November 1993
- Management Associate, Donaldson, Lufkin & Jenrette Pershing Division, June 1986 to December 1987

Item 3 - Disciplinary Information

Christopher M. Travers has never had any disciplinary disclosures to be reported.

Item 4 - Other Business Activities

Christopher M. Travers is currently not engaged in any other investment related business or occupation.

Item 5 - Additional Compensation

Christopher M. Travers receives compensation from Logan Capital Management, Inc. from his responsibilities as Managing Director, National Sales and Business Development responsibilities and for providing advisory services to clients.

Item 6 - Supervision

Christopher M. Travers reports directly to the Logan Capital Management, Inc. Executive Committee, which is headed by Al Besse. Mr. Besse can be reached at 215-569-1100.



Daniel J. Hesketh, CFA
Managing Director
Analytics, and Client Service

Item 2 - Educational Background and Business Experience

Year of Birth: 1975

Professional Designations:

- CFA (Chartered Financial Analyst): The CFA charter is a globally recognized, graduate-level investment credential. To earn the CFA charter, candidates must have four years of qualified investment work experience, and successfully complete the CFA Program, a graduate-level self-study program that combines a broad curriculum with professional conduct requirements, culminating in three sequential exams. To be eligible to enroll in the CFA Program, candidates must have a bachelor's degree or equivalent education or work experience.

Education:

- Eckerd College (BA, Economics, 1997)
- The University of Tampa (MBA, 2004)

Business Background:

- Analyst, Raymond James Financial, April 2000 to September 2005

Item 3 - Disciplinary Information

Daniel J. Hesketh has never had any disciplinary disclosures to be reported.

Item 4 - Other Business Activities

Daniel J. Hesketh is currently not actively engaged in any other investment related business or occupation.

Item 5 - Additional Compensation

Daniel J. Hesketh receives compensation from Logan Capital Management, Inc. from his responsibilities as Managing Director, and for providing advisory services to clients. Mr. Hesketh does not receive any other economic benefit for providing advisory services.

Item 6 - Supervision

Daniel J. Hesketh reports directly to the Logan Capital Management, Inc. Executive Committee, which is headed by Al Besse. Mr. Besse can be reached at 215-569-1100.



Christopher O'Keefe, CFA

Managing Director
Portfolio Manager

Item 2 - Educational Background and Business Experience

Year of Birth: 1964

Education:

- Villanova University (BA, 1986)

Business Background:

- Vice President, Lead Portfolio Manager—Manulife Asset Management, January 2001 to January 2019
- Director—Affinity Wealth Management, January 1995 to January 2000
- Sr. Investment Analyst—CoreStates Investment Advisers, January 1990 to January 1995
- Investment Analyst—First Pennsylvania Bank, January 1986 to January 1990

Item 3 – Disciplinary Information

Christopher O'Keefe has never had any disciplinary disclosures to be reported.

Item 4 – Other Business Activities

Christopher O'Keefe is currently not actively engaged in any other investment related business or occupation.

Item 5 – Additional Compensation

Christopher O'Keefe receives compensation from Logan Capital Management, Inc. from his responsibilities as Managing Director, and for providing advisory services to clients. Mr. O'Keefe does not receive any other economic benefit for providing advisory services.

Item 6 – Supervision

Christopher O'Keefe reports directly to the Logan Capital Management, Inc. Executive Committee which is headed by Al Besse. Mr. Besse can be reached at 215-569-1100.



Wayne M. Breisch, CFA

Managing Director

Portfolio Manager

Item 2 - Educational Background and Business Experience

Year of Birth: 1963

Education:

- Penn State University (BS, BA, 1986)
- Columbia Business School (MBA, 1990)

Business Background:

- Portfolio Manager—Manulife Asset Management, September 2000 to January 2019
- Senior Financial Counselor—AMG National Trust Bank, July 1995 to September 2000
- Vice President — Bank of America, January 1995 to July 1995
- Manager—PwC (PricewaterhouseCoopers), June 1990 to January 1995
- Engineer—General Electric, June 1986 to August 1988

Item 3 – Disciplinary Information

Wayne M. Breisch has never had any disciplinary disclosures to be reported.

Item 4 – Other Business Activities

Wayne M. Breisch is currently not actively engaged in any other investment related business or occupation.

Item 5 – Additional Compensation

Wayne M. Breisch receives compensation from Logan Capital Management, Inc. from his responsibilities as Managing Director, and for providing advisory services to clients. Mr. Breisch does not receive any other economic benefit for providing advisory services.

Item 6 – Supervision

Wayne M. Breisch reports directly to the Logan Capital Management, Inc. Executive Committee which is headed by Al Besse. Mr. Besse can be reached at 215-569-1100.



Christopher Ouimet, CFA

Managing Director

Portfolio Manager

Item 2 - Educational Background and Business Experience

Year of Birth: 1967

Education:

- Albright College (BA, 1989)
- St. Joseph University (MBA, 1993)

Business Background:

- Portfolio Manager—Manulife Asset Management, October 2011 to January 2019
- Portfolio Manager—Knott Asset Management, July 2010 to October 2011
- Director—Manager Due Diligence, TCP Global Investments, April 2008 to November 2009
- Portfolio Manager—Pitcairn Financial Group, January 2005 to April 2008
- Portfolio Manager—Geewax, Terker & Company, October 1994 to March 2004

Item 3 – Disciplinary Information

Christopher Ouimet has never had any disciplinary disclosures to be reported.

Item 4 – Other Business Activities

Christopher Ouimet is currently not actively engaged in any other investment related business or occupation.

Item 5 – Additional Compensation

Christopher Ouimet receives compensation from Logan Capital Management, Inc. from his responsibilities as Managing Director, and for providing advisory services to clients. Mr. Ouimet does not receive any other economic benefit for providing advisory services.

Item 6 – Supervision

Christopher Ouimet reports directly to the Logan Capital Management, Inc. Executive Committee which is headed by Al Besse. Mr. Besse can be reached at 215-569-1100.



Sarah J. Henry

Managing Director

Portfolio Manager

Item 2 - Educational Background and Business Experience

Year of Birth: 1972

Education:

- University of Vermont (BA, 1994)
- Boston University (MSA in Multinational Commerce, 1998)

Business Background:

- Senior Research Officer, Director—Manulife Asset Management, Dividend Performers Team, October 1999 to January 2019
- Domestic Equity Project Lead, Risk Management Team—Manulife Asset Management, April 1997 to October 1999
- Staff Assistant to CEO, John Hancock Financial Services, February 1995 to April 1997

Item 3 – Disciplinary Information

Sarah J. Henry has never had any disciplinary disclosures to be reported.

Item 4 – Other Business Activities

Sarah J. Henry is currently not actively engaged in any other investment related business or occupation.

Item 5 – Additional Compensation

Sarah J. Henry receives compensation from Logan Capital Management, Inc. from her responsibilities as Managing Director, and for providing advisory services to clients. Ms. Henry does not receive any other economic benefit for providing advisory services.

Item 6 – Supervision

Sarah J. Henry reports directly to the Logan Capital Management, Inc. Executive Committee which is headed by Al Besse. Mr. Besse can be reached at 215-569-1100.