



For Immediate Release:  
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### **Highland Associates Adds Three to its Staff**

*Moves add skill and capacity for growth*

Highland Associates, a subsidiary of Regions Financial Corporation, announced today it has added three staff members to its team. The move builds capacity and skill in roles where increased focus and attention are needed as the firm's clientele expands.

Specifically, the firm enhanced its capabilities in capital markets analytics with the hiring of William Klein. Klein joins Highland following his successful tenure with a multi-family office advisor in Marion, Massachusetts. He brings significant experience in strategic capital markets and manager selection content, including ESG investments. His primary responsibilities will be strategic analysis ranging from macroeconomic themes to portfolio allocations. Klein earned his undergraduate degree from Bard College and is a CFA charterholder.

The firm also added capacity to its client operations and support functions. Making an internal transfer within Regions, Stephen Sheffield moves into an associate consultant role. He will support the firm's investment consultants and synergistic support with Regions' operations. Prior to his role in Highland, he served as an internal portfolio manager with Regions Asset Management, where he supported portfolio managers in Florida. Sheffield double majored in finance and management at the University of Alabama.

Finally, the firm will expand its client support operations in St. Louis with the most recent hiring of Ivy Lung. Lung will also support the institutional consultants with portfolio analysis, operations support and portfolio implementation. She joins Highland following her successful tenure with McAuley Portfolio Management Company, the investment management team at Mercy Health System in Missouri. She brings capabilities that will expand the firm's knowledge of Asian investment opportunities, including being fluent in Mandarin Chinese. She earned her undergraduate degree in economics from the University of California, Los Angeles.

The firm is positioned to further assist clients through this challenging economic and capital markets cycle with these additions. Trey Echols, head of Highland Associates, said, "We very much value surrounding ourselves with uncommon talent. Adding Will, Stephen and Ivy to our team gives us greater depth to broaden our global perspective and deepens our experience within the healthcare industry. We think their skills will lift our capabilities at a time when sound perspective is of significant value."

About Highland Associates:

Highland Associates is a leading institutional investment firm that provides objective, research-driven investment counsel to not-for-profit healthcare entities and mission-based organizations. Our hyper-awareness of financial market dynamics, seasoned industry knowledge and commitment to due diligence inform our forward-looking and customized investment management programs. Highland Associates was founded in 1987 and advises clients nationwide. For more information, visit [www.highlandassoc.com](http://www.highlandassoc.com).