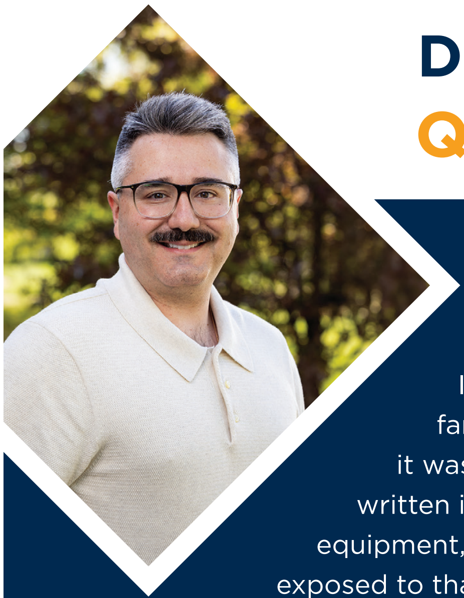
INVESTOR **SPOTLIGHT**



DOCEO WEALTH

Q&A WITH DAVID JOHAN, PRESIDENT

DOCEO
WEALTH

What inspired the creation of Doceo Wealth, and what is the core mission driving the firm today?

I didn't grow up around boardrooms or balance sheets. I grew up in a small farming community in France, where business wasn't something you studied, it was something you lived. Deals were made with handshakes. Trust wasn't written into contracts; it was built over time. And wealth wasn't abstract, it was land, equipment, relationships, and the quiet understanding that your word mattered. I was exposed to that world early. Real assets. Private lending. People backing each other, not because of spreadsheets, but because of conviction and reputation. Then I saw the other side of finance. A world that felt increasingly distant from the people it was meant to serve. Where advice became standardized, relationships became transactional, and complexity replaced clarity.

That contrast stayed with me. Because I had seen what it looked like when capital was personal. When decisions carried weight. When trust had to be earned. Doceo Wealth was built to bring that back. And everyone at Doceo brings those characteristics, because if you want to go far, go together!

What differentiates Doceo Wealth from other firms in the wealth management industry?

"Doceo" means to teach and that's intentional. Not teaching in the traditional sense but helping people truly understand their capital; how it works, where it's going, and why it matters. Because real confidence doesn't come from being told what to do. It comes from understanding. A true return to principles that actually work: alignment, clarity, and trust that's built over time, not packaged and sold. This isn't about pushing products or managing portfolios in isolation. It's about building a relationship where clarity replaces confusion, where decisions are made with intention, and where capital is aligned with something real and tangible. Because wealth isn't just what you own, it's what you understand, what you build, and who you trust along the way. That's the foundation Doceo Wealth is built on.

Doceo Wealth differentiates itself by redefining wealth management through a fully aligned, fiduciary model that minimizes conflicts and places the client at the center of every decision. The firm combines an endowment-style investment approach, bringing exclusive, institutional-quality opportunities to individuals and families with a commitment to investing alongside its clients. Paired with a planning first, relationship-driven philosophy, Doceo delivers highly personalized strategies aligned with each client's goals and values. Through transparency, education, and long-term partnerships, the firm goes beyond managing assets to deliver disciplined, outcome-focused advice designed to build, preserve, and transfer wealth across generations.

DOCEO TEAM

Scott Mason
Sr. Wealth Advisor & CCO

Travis Higgins
Sr. Wealth Advisor

Jeffrey Durham
Sr. Wealth Advisor

Julie Olsen
Director of Operations

Mark Blaser
Financial Analyst

Kat Olsen
Executive Operations

Why have alternative investments grown in importance for the clients you work with?

Alternative investments have become increasingly important for Doceo Wealth clients because traditional stock-and-bond portfolios often cannot deliver the diversification, asset-backed protection, income stability, and inflation resilience that today's customers demand. Guided by an endowment-style philosophy, Doceo incorporates private equity, real assets, private credit, and other non-traditional strategies to access multiple sources of return, income and tax strategies, building more resilient portfolios across market cycles. These investments also allow for closer alignment with specific client objectives while providing access to opportunities typically unavailable through traditional channels, making alternatives a core component of a disciplined, forward-looking, wealth-building strategy.

What excites you most about the future of wealth management?

What excites us most about the future of wealth management is the shift towards true alignment and personalization with access to solutions that go beyond product-driven advice. Expanded access to institutional-quality investments, combined with advancements in technology and data, enable more sophisticated and resilient portfolios. At the same time, artificial intelligence is enhancing decision-making and improving risk management, allowing advisors to focus more on strategic guidance than product-based solutions. As clients place greater emphasis on education, transparency, and multi-generational planning, the industry is becoming more focused on advice powered by technology, clarity, and purpose, grounded in trust.