

Epoch Investment Partners, Inc.
Brochure Supplement

Equity Strategies

William W. Priest	Michael A. Welhoelter
William J. Booth	Steven Bleiberg
Justin Howell	Lin Lin
Glen Petraglia	Lilian Quah
David Siino	Timothy Sledge
John M. Tobin	Kera Van Valen
Jeffrey Tiefenbach	Alfred Li
Michael Brown	Stephen Salzone

Fixed Income Strategies

Glenn Davis	Dennis Woessner
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This Brochure Supplement provides information about the individuals listed above and supplements the Brochure of Epoch Investment Partners, Inc. (“Epoch”) which you should have also received. Please contact David A. Barnett, Managing Attorney & Chief Compliance Officer at 212-303-7200, if you have any questions about the Form ADV Brochure or the Brochure Supplement, or if you would like to request additional or updated copies of either document.

Additionally, a *Summary of Professional Designations* is included with this Part 2B Brochure Supplement. The list is provided to assist you in evaluating the professional designations held by certain of our investment professionals.

Additional information about Epoch is available on the SEC’s website at www.adviserinfo.sec.gov.

William W. Priest

William W. Priest, CFA – *Executive Chairman, Co – Chief Investment Officer & Portfolio Manager*

Item 2: Educational Background and Business Experience

William is Executive Chairman and Co-Chief Investment Officer of Epoch. He is a portfolio manager for Epoch's global equity investment strategies. Prior to co-founding Epoch in 2004, William was a Co-Managing Partner and portfolio manager at Steinberg Priest & Sloane Capital Management, LLC for three years. Before joining Steinberg Priest, he was a member of the Global Executive Committee of Credit Suisse Asset Management ("CSAM"), Chairman and Chief Executive Officer of Credit Suisse Asset Management Americas and CEO and portfolio manager of its predecessor firm BEA Associates, which he co-founded in 1972. During his thirty-year tenure at BEA and CSAM, he developed the firm into a well-recognized investment manager with over \$100 billion under management.

William is the author of several published articles and papers on investing and finance, including the books, *The Financial Reality of Pension Funding Under ERISA*, *Free Cash Flow and Shareholder Yield: New Priorities for the Global Investor*, and the more recent *Winning at Active Management: The Essential Roles of Culture, Philosophy and Technology* (with co-authors Steven Bleiberg and Michael Welhoelter). The latter two, published by John Wiley & Sons, detail the underpinnings of our investment approach. He holds the Chartered Financial Analyst designation, is a former CPA and a graduate of Duke University and the University of Pennsylvania Wharton Graduate School of Business. He is a Member of the Council on Foreign Relations. Mr. Priest was born in 1941.

Item 3: Disciplinary Information

Mr. Priest has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Priest or of Epoch.

Item 4: Other Business Activities

Mr. Priest is not actively engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of Epoch.

Item 5: Additional Compensation

Mr. Priest does not receive economic benefits from any person or entity other than Epoch in connection with the provision of investment advice to clients.

Item 6: Supervision

Mr. Priest reports to the senior management of The Toronto Dominion Bank who supervise his activities. Mr. Priest can be reached directly by calling the telephone number on the cover of this Brochure Supplement.

Michael A. Welhoelter

Michael A. Welhoelter, CFA – *President, Managing Director, Co-Chief Investment Officer, Portfolio Manager, Head of Risk Management*

Item 2: Educational Background and Business Experience

Mike is the President, Co-Chief Investment Officer and Chief Risk Officer. He is also a portfolio manager on all of Epoch's strategies. He is responsible for integrating risk management into the investment process. Prior to joining Epoch in 2005, he was a Director and portfolio manager in the Quantitative Strategies Group at Columbia Management Group, Inc. In this role, he managed as part of a team over \$5 billion in mutual funds and separately managed portfolios. Prior to joining Columbia Management Group, he was at Credit Suisse Asset Management Group ("CSAM"), where he was a portfolio manager in the Structured Equity group, overseeing long/short market neutral and large cap core products. Before joining CSAM, he was a portfolio manager and quantitative research analyst at Chancellor/LGT Asset Management. Mike is an author (with co-authors Bill Priest and Steven Bleiberg) of *Winning at Active Management: The Essential Roles of Culture, Philosophy and Technology*. The book, published by John Wiley & Sons, details the underpinnings of our investment approach. Mike holds a BA degree in Computer and Information Science from Colgate University. He is a member of the New York Society of Security Analysts, the Society of Quantitative Analysts and holds the Chartered Financial Analyst designation. Mr. Welhoelter was born in 1962.

Item 3: Disciplinary Information

Mr. Welhoelter has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Welhoelter or of Epoch.

Item 4: Other Business Activities

Mr. Welhoelter is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of Epoch.

Item 5: Additional Compensation

Mr. Welhoelter does not receive economic benefits from any person or entity other than Epoch in connection with the provision of investment advice to clients.

Item 6: Supervision

Mike Welhoelter reports directly to Bruce Cooper, Epoch's Chief Executive Officer and William Priest, Epoch's Executive Chairman, Co-Chief Investment Officer and Portfolio Manager. Any of these individuals can be reached directly by calling the telephone number on the cover of this Brochure Supplement.

William J. Booth

William J. Booth, CFA – Managing Director, Co-Chief Investment Officer and Portfolio Manager

Item 2: Educational Background and Business Experience

William is Co-Chief Investment Officer and is a portfolio manager for Non-U.S. and Global Equity strategies. William joined Epoch in 2009 from PioneerPath Capital, which is a long/short equity hedge fund where he was a consumer and retail analyst. Prior to PioneerPath, he was a senior analyst at Level Global where he focused on the consumer and industrial sectors. He also held an equity research position at Louis Dreyfus Commodities and was a credit analyst with Citigroup. William holds a BS in Chemical Engineering from Yale University and an MBA from New York University's Leonard N. Stern School of Business. He holds the Chartered Financial Analyst designation. Mr. Booth was born in 1974.

Item 3: Disciplinary Information

Mr. Booth has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Booth or of Epoch.

Item 4: Other Business Activities

Mr. Booth is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of Epoch.

Item 5: Additional Compensation

Mr. Booth does not receive economic benefits from any person or entity other than Epoch in connection with the provision of investment advice to clients.

Item 6: Supervision

William Booth reports directly to David Sykes, Senior Vice President and Chief Investment Officer at TD Asset Management Inc. Any of these individuals can be reached directly by calling the telephone number on the cover of this Brochure Supplement.

Steven Bleiberg

Steven Bleiberg – *Managing Director, Global Portfolio Manager*

Item 2: Educational Background and Business Experience

Steven is a member of the global portfolio management team and is responsible for the design and development of investment strategies. Steven is also a Portfolio Manager in the Global Equity Capital Reinvestment Strategy. Prior to joining Epoch, Steven served as a portfolio manager at Legg Mason responsible for managing \$7.5B in various asset allocation-based funds including Target Risk, Target Date and Dynamic Risk Management. Prior to that, he was the head of investment strategy at Citigroup Asset Management and a portfolio manager at Credit Suisse Asset Management. Steven is an author (with co-authors Bill Priest and Michael Welhoelter) of *Winning at Active Management: The Essential Roles of Culture, Philosophy and Technology*. The book, published by John Wiley & Sons, details the underpinnings of our investment approach. Steven holds an AB from Harvard and an MS from the Sloan School of Management at MIT with a concentration in Finance. Mr. Bleiberg was born in 1959.

Item 3: Disciplinary Information

Mr. Bleiberg has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Bleiberg or of Epoch.

Item 4: Other Business Activities

Mr. Bleiberg is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of Epoch.

Item 5: Additional Compensation

Mr. Bleiberg does not receive economic benefits from any person or entity other than Epoch in connection with the provision of investment advice to clients.

Item 6: Supervision

Mr. Bleiberg reports directly to William Booth, Epoch's Co-Chief Investment Officer. Any of these individuals can be reached directly by calling the telephone number on the cover of this Brochure Supplement.

Justin Howell

Justin Howell, CFA – *Managing Director, Portfolio Manager*

Item 2: Educational Background and Business Experience

Justin Howell is a portfolio manager for the U.S. equity investment strategies. Prior to joining Epoch in 2012, Mr. Howell spent nine years at JPMorgan Chase as a research analyst. Mr. Howell has experience in the consumer, financial services and healthcare services sectors. Previously he worked in the research department at FTN Midwest Research. Mr. Howell earned a BA in Business Administration from the University of Michigan. He holds the Chartered Financial Analyst designation. Mr. Howell was born in 1980.

Item 3: Disciplinary Information

Mr. Howell has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Howell or of Epoch.

Item 4: Other Business Activities

Mr. Howell is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of Epoch.

Item 5: Additional Compensation

Mr. Howell does not receive economic benefits from any person or entity other than Epoch in connection with the provision of investment advice to clients.

Item 6: Supervision

Mr. Howell reports directly to William Booth, Epoch's Co-Chief Investment Officer and Portfolio Manager. Any of these individuals can be reached directly by calling the telephone number on the cover of this Brochure Supplement.

Lin Lin

Lin Lin, CFA – *Managing Director, Portfolio Manager, Quantitative Research and Risk Management*

Item 2: Educational Background and Business Experience

Ms. Lin is a portfolio manager and a member of the Quantitative Research and Risk Management team. Prior to joining Epoch in 2017, Lin was a vice president and equity strategist on the Global Quantitative Research team at Morgan Stanley, where she helped launch their global quantitative product and published research on a variety of topics, including stock selection and ESG investing. Before that, she was an assistant vice president and senior research analyst on the Quantitative Research and Portfolio Strategy team at Sanford C. Bernstein. Lin began her career as a consulting associate at FMI Corp. Lin has a B.A. in Economics from Nanjing University, and an M.A. in Economics from Duke University. Ms. Lin was born in 1978.

Item 3: Disciplinary Information

Ms. Lin has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Ms. Lin or of Epoch.

Item 4: Other Business Activities

Ms. Lin is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of Epoch.

Item 5: Additional Compensation

Ms. Lin does not receive economic benefits from any person or entity other than Epoch in connection with the provision of investment advice to clients.

Item 6: Supervision

Ms. Lin reports directly to Lilian Quah, Managing Director, Portfolio Manager, Head of Quantitative Research. Any of these individuals can be reached directly by calling the telephone number on the cover of this Brochure Supplement.

Glen Petraglia

Glen Petraglia, CFA – *Managing Director, Portfolio Manager and Research Analyst*

Item 2: Educational Background and Business Experience

Glen is a portfolio manager for our Non-U.S. Equity strategy. Prior to joining Epoch in 2014, Glen was a generalist portfolio manager and an analyst at Standard Life Investments in Boston, where he focused on consumer staples, restaurants and regional banks. Before Standard Life, he held positions at Citigroup and Nabisco. Glen received his BS from Providence College, an MBA from NYU's Stern School of Business and holds the Chartered Financial Analyst designation. Mr. Petraglia was born in 1972.

Item 3: Disciplinary Information

Mr. Petraglia has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Petraglia or of Epoch.

Item 4: Other Business Activities

Mr. Petraglia is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of Epoch.

Item 5: Additional Compensation

Mr. Petraglia does not receive economic benefits from any person or entity other than Epoch in connection with the provision of investment advice to clients.

Item 6: Supervision

Mr. Petraglia reports directly to David Siino, a Managing Director, Portfolio Manager and Senior Research Analyst at Epoch. Any of these individuals can be reached directly by calling the telephone number on the cover of this Brochure Supplement.

Lilian Quah

Lilian Quah, CFA – Managing Director, Portfolio Manager, Head of Quantitative Research

Item 2: Educational Background and Business Experience

Lilian is a portfolio manager and Head of Quantitative Research. Prior to joining Epoch in 2013, she spent five years at AllianceBernstein, where she was a senior quantitative analyst in the Value Equities Group. Before Bernstein, Lilian was a senior consultant in the finance practice at the ERS Group, an economics consulting firm. Lilian has a BA in Economics from Wellesley College and a Masters in Economics from Stanford University. She holds the Chartered Financial Analyst designation. Ms. Quah was born in 1973.

Item 3: Disciplinary Information

Ms. Quah has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Ms. Quah or of Epoch.

Item 4: Other Business Activities

Ms. Quah is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of Epoch.

Item 5: Additional Compensation

Ms. Quah does not receive economic benefits from any person or entity other than Epoch in connection with the provision of investment advice to clients.

Item 6: Supervision

Lilian Quah reports directly to William Booth, Epoch's Co-Chief Investment Officer and Portfolio Manager. Any of these individuals can be reached directly by calling the telephone number on the cover of this Brochure Supplement.

Stephen Salzone

Stephen Salzone, CFA– *Director, Portfolio Manager and Research Analyst*

Item 2: Educational Background and Business Experience

Stephen is a portfolio manager and equity research analyst. Prior to joining Epoch in 2017, Stephen spent 13 years at AllianceBernstein, most recently as a research analyst for the Value Equities strategies focusing on U.S. small-cap to mid-cap companies in several sectors. Stephen received his BS in Business Information Systems from Messiah College. Mr. Salzone was born in 1981.

Item 3: Disciplinary Information

Mr. Salzone has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Salzone or of Epoch.

Item 4: Other Business Activities

Mr. Salzone is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of Epoch.

Item 5: Additional Compensation

Mr. Salzone does not receive economic benefits from any person or entity other than Epoch in connection with the provision of investment advice to clients.

Item 6: Supervision

Mr. Salzone reports directly to Justin Howell, Managing Director, Portfolio Manager at Epoch. Any of these individuals can be reached directly by calling the telephone number on the cover of this Brochure Supplement.

David Siino

David Siino, CFA, CAIA – *Managing Director, Portfolio Manager and Senior Research Analyst*

Item 2: Educational Background and Business Experience

David is a portfolio manager and senior research analyst on Epoch's Capital Reinvestment strategy. Prior to joining Epoch in 2007, he was a research analyst with Gabelli & Company where he was responsible for covering the financial services sector, overseeing the automotive sector research team and making buy/sell recommendations for the Gabelli mutual funds. Before joining Gabelli & Company, David was an assistant research director for Barron's Business and Financial Weekly. David holds a BA from Hofstra University and an MBA from Baruch College. He holds the Chartered Financial Analyst and Chartered Alternative Investment Analyst designations. Mr. Siino was born in 1975.

Item 3: Disciplinary Information

Mr. Siino has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Siino or of Epoch.

Item 4: Other Business Activities

Mr. Siino is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of Epoch.

Item 5: Additional Compensation

Mr. Siino does not receive economic benefits from any person or entity other than Epoch in connection with the provision of investment advice to clients.

Item 6: Supervision

Mr. Siino reports directly to William Booth, Epoch's Co-Chief Investment Officer and Portfolio Manager. Any of these individuals can be reached directly by calling the telephone number on the cover of this Brochure Supplement.

Timothy Sledge

Timothy Sledge, CFA – *Director, Portfolio Manager and Senior Research Analyst*

Item 2: Educational Background and Business Experience

Tim is a portfolio manager and senior research analyst. Prior to joining Epoch in 2011, Tim was a principal and sector research team leader at Bessemer Trust Company, where he worked on Bessemer's global financials team. Previously, Tim was a junior analyst with Sanford C. Bernstein, covering the insurance sector. Prior to Sanford C. Bernstein, he was a manager of institutional research at Davis Advisors. Tim holds a BA in Economics and English from the University of Pennsylvania. Mr. Sledge was born in 1972.

Item 3: Disciplinary Information

Mr. Sledge has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Sledge or of Epoch.

Item 4: Other Business Activities

Mr. Sledge is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of Epoch.

Item 5: Additional Compensation

Mr. Sledge does not receive economic benefits from any person or entity other than Epoch in connection with the provision of investment advice to clients.

Item 6: Supervision

Mr. Sledge reports directly to Lilian Quah, Managing Director, Portfolio Manager and Head of Quantitative Research. Any of these individuals can be reached directly by calling the telephone number on the cover of this Brochure Supplement.

John M. Tobin

John M. Tobin, PhD, CFA – *Managing Director, Portfolio Manager & Senior Research Analyst*

Item 2: Educational Background and Business Experience

John is a portfolio manager for our Global and U.S. Equity Shareholder Yield strategies and a senior global equity research analyst. Prior to joining Epoch in 2012, John taught undergraduate economics as a lecturer at Fordham University. Before that he spent four years at HSBC Global Asset Management as a senior research analyst and almost twenty years at Credit Suisse Asset Management where he was a senior research analyst for the U.S. High Yield Bond team. Previously he worked at Bankers Trust Company where he began his career. John received AB, AM and PhD degrees in Economics from Fordham University and holds the Chartered Financial Analyst designation. Mr. Tobin was born in 1957.

Item 3: Disciplinary Information

Mr. Tobin has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Tobin or of Epoch.

Item 4: Other Business Activities

Mr. Tobin is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of Epoch.

Item 5: Additional Compensation

Mr. Tobin does not receive economic benefits from any person or entity other than Epoch in connection with the provision of investment advice to clients.

Item 6: Supervision

John Tobin reports directly to Kera Van Valen, a Managing Director, Portfolio Manager and Research Manager of Epoch. Any of these individuals can be reached directly by calling the telephone number on the cover of this Brochure Supplement.

Kera Van Valen

Kera Van Valen, CFA – Managing Director, Portfolio Manager & Senior Research Analyst

Item 2: Educational Background and Business Experience

Kera is a portfolio manager for our Global and U.S. Equity Shareholder Yield strategies and a senior research analyst. Prior to joining the Global Equity team Kera was an analyst within Epoch's Quantitative Research & Risk Management team. Before joining Epoch in 2005, she was a portfolio manager of Structured Equities and Quantitative Research at Columbia Management Group where she was responsible for the day-to-day management of two index funds. She also worked at Credit Suisse Asset Management. Kera received her BA in Mathematics at Colgate University and her MBA at Columbia University, Graduate School of Business. She holds the Chartered Financial Analyst designation. Ms. Van Valen was born in 1979.

Item 3: Disciplinary Information

Ms. Van Valen has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Ms. Van Valen or of Epoch.

Item 4: Other Business Activities

Ms. Van Valen is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of Epoch.

Item 5: Additional Compensation

Ms. Van Valen does not receive economic benefits from any person or entity other than Epoch in connection with the provision of investment advice to clients.

Item 6: Supervision

Kera Van Valen reports directly to Michael Welhoelter, President, Chief Investment Officer and Head of Risk Management at Epoch Chief Risk Officer. Any of these individuals can be reached directly by calling the telephone number on the cover of this Brochure Supplement.

Jeffrey Tiefenbach

Jeffrey Tiefenbach, CFA– Managing Director, Lead Portfolio Manager, International Equity

Item 2: Educational Background and Business Experience

Jeffrey is a Managing Director and Portfolio Manager of Epoch Investment Partners, Inc. Prior to 2021, Jeffrey was a Portfolio Manager of TDAM USA Inc. and TD Greystone Asset Management. Prior to joining Greystone Asset Management Jeffrey was VP, Global Equities at Phillips, Hager & North Investment Management and an Analyst, Canadian Equities at Crown Life Insurance. Jeffrey holds an HBA in Business Administration from the University of Western Ontario and holds the Chartered Financial Analyst designation. Mr. Tiefenbach was born in 1971.

Item 3: Disciplinary Information

Mr. Tiefenbach has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Tiefenbach or of Epoch.

Item 4: Other Business Activities

Mr. Tiefenbach is also a portfolio manager for TD Asset Management Inc., an affiliate of Epoch and is registered in all provinces and territories in Canada.

Item 5: Additional Compensation

Mr. Tiefenbach does not receive economic benefits from any person or entity other than TD/Epoch in connection with the provision of investment advice to clients.

Item 6: Supervision

Mr. Tiefenbach reports directly to Justin Flowerday, Vice President and Managing Director at TD Asset Management Inc. Any of these individuals can be reached directly by calling the telephone number on the cover of this Brochure Supplement.

Alfred Li

Alfred Li, CFA– Vice President and Director & Co Lead, International Equity

Item 2: Educational Background and Business Experience

Alfred is a Vice President and Director & Co-Lead, International Equity of Epoch Investment Partners, Inc. Prior to 2021, Alfred was a Vice President and Director & Co Lead, International Equity of TDAM USA Inc. and TD Greystone Asset Management. Prior to joining Greystone Asset Management, Alfred was an Investment Project Manager at Tianjin Free Trade Zone Administrative Committee, an Industrial Engineer at Tianjin Pharmaceutical Design Institute, and a Product Manager at Tianjin Medicines & Healthcare Products Import and Export Corp.

Alfred holds a B.Eng. in Chemical Pharmacy, East China University of Science and Technology, a B.B.A. in International Business, East China University of Science and Technology, an MBA, Richard Ivey School of Business and a HBA in Business Administration from the University of Western Ontario. Alfred holds the Chartered Financial Analyst designation. Mr. Li was born in 1975.

Item 3: Disciplinary Information

Mr. Li has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Li or of Epoch.

Item 4: Other Business Activities

Mr. Li is also a portfolio manager for TD Asset Management Inc., an affiliate of Epoch and is registered in all provinces and territories in Canada.

Item 5: Additional Compensation

Mr. Li does not receive economic benefits from any person or entity other than TD/Epoch in connection with the provision of investment advice to clients.

Item 6: Supervision

Mr. Li reports directly to Jeffrey Tiefenbach, Lead Portfolio Manager, International Equity at Epoch and TD Asset Management Inc. Any of these individuals can be reached directly by calling the telephone number on the cover of this Brochure Supplement.

Michael Brown

Michael Brown, CFA– *Vice President and Director & Co Lead, International Equity*

Item 2: Educational Background and Business Experience

Michael is a Vice President and Director & Co Lead, International Equity of Epoch Investment Partners, Inc. Prior to December 2021, Michael was a Vice President of TDAM USA Inc. and TD Greystone Asset Management supporting International Equity Research. Prior to joining Greystone Asset Management Michael was a Portfolio Manager at Vancity Investment Management, and an Investment Management Research Associate at Phillips, Hager & North Investment Management. Michael holds a B.Comm of Finance & International Business, University of Northern British Columbia and holds the Chartered Financial Analyst designation, CFA Institute. Mr. Brown was born in 1974.

Item 3: Disciplinary Information

Mr. Brown has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Brown or of Epoch.

Item 4: Other Business Activities

Mr. Brown is also a portfolio manager for TD Asset Management Inc., an affiliate of Epoch and is registered in all provinces and territories in Canada.

Item 5: Additional Compensation

Mr. Brown does not receive economic benefits from any person or entity other than TD/Epoch in connection with the provision of investment advice to clients.

Item 6: Supervision

Mr. Brown reports directly to Jeffrey Tiefenbach, Lead Portfolio Manager, International Equity at Epoch and TD Asset Management Inc. Any of these individuals can be reached directly by calling the telephone number on the cover of this Brochure Supplement.

Glenn Davis

Glenn Davis, CFA – *Managing Director and Lead Portfolio Manager, Fixed Income*

Item 2: Educational Background and Business Experience

Glenn is a Managing Director and Portfolio Manager of Epoch Investment Partners, Inc. Prior to December 2021, Glenn was a Portfolio Manager of TDAM USA Inc. Prior to joining TD Banknorth Wealth Management in 2005, Glenn was Senior Portfolio Manager, Head of Fixed Income at Freedom Capital Management, Senior Portfolio Manager at S.A.C. Capital, Principal at Boston Partners Asset Management, L.P, Sr Portfolio Manager at Boston Company Asset Management, and State Head of Money Market Group at Street Global.

Glenn holds a MBA, Hofstra University Graduate School of Business and a BA in Economics, Colby College. Glenn holds the Chartered Financial Analyst designation, CFA Institute. Mr. Davis was born in 1958.

Item 3: Disciplinary Information

Mr. Davis has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Davis or of Epoch.

Item 4: Other Business Activities

Mr. Davis is also a portfolio manager for TD Asset Management Inc., an affiliate of Epoch and is registered in all provinces and territories in Canada.

Item 5: Additional Compensation

Mr. Davis does not receive economic benefits from any person or entity other than TD/Epoch in connection with the provision of investment advice to clients.

Item 6: Supervision

Mr. Davis reports directly to Michael Augustine, Vice President and Managing Director of TD Asset Management Inc. Any of these individuals can be reached directly by calling the telephone number on the cover of this Brochure Supplement.

Dennis Woessner

Dennis Woessner, CFA – *Portfolio Manager, Fixed Income*

Item 2: Educational Background and Business Experience

Dennis is a Portfolio Manager, Fixed Income at Epoch Investment Partners, Inc. Prior to December 2021, Dennis was a Portfolio Manager of TDAM USA Inc. Prior to joining TDAM USA, Dennis was a Fixed Income Portfolio Manager at MFM International, a Fixed Income Trader and Stanish Mellon Asset Management and a Fixed Income Analyst at Salomon Brother Inc. Dennis holds a BBA, Hofstra University and holds the Chartered Financial Analyst designation. Mr. Woessner was born in 1966.

Item 3: Disciplinary Information

Mr. Woessner has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Woessner or of Epoch.

Item 4: Other Business Activities

Mr. Woessner is also a portfolio manager for TD Asset Management Inc., an affiliate of Epoch and is registered in all provinces and territories in Canada.

Item 5: Additional Compensation

Mr. Woessner does not receive economic benefits from any person or entity other than TD/Epoch in connection with the provision of investment advice to clients.

Item 6: Supervision

Mr. Woessner reports directly to Glenn Davis, Managing Director and Lead Portfolio Manager, Fixed Income. Any of these individuals can be reached directly by calling the telephone number on the cover of this Brochure Supplement.

SUMMARY OF PROFESSIONAL DESIGNATIONS

This Summary of Professional Designations is provided to assist you in evaluating the professional designations and minimum requirements of our investment professionals to hold these designations.

“Understanding Professional Designations” may also be helpful and found on the FINRA website at: <https://www.finra.org/investors/professional-designations>

CFA – Chartered Financial Analyst

The Charter Financial Analyst (CFA) designation is an international professional certification issued by the CFA Institute (formerly AIMR) to qualified candidates who complete a series of three examinations. To become a candidate for a CFA charter, candidates must meet one of the following requirements: 1) Undergraduate degree and four years of professional experience involving investment decision-making, or; 2) Four years qualified work experience (full time, but not necessarily investment related). Candidates may become a CFA Charterholder if they successfully pass three course exams, Levels 1, 2, and 3. The CFA Institute has stated that the average candidate may need approximately 250 hours of study for each of the three levels. The CFA curriculum includes these topic areas: Ethical and Professional Standards; Quantitative Methods (such as the time value of money, and statistical inference); Economics; Financial Reporting and Analysis; Corporate Finance; Analysis of Investments (stocks, bonds, derivatives, venture capital, real estate, etc.); Portfolio Management and Analysis (asset allocation, portfolio risk, performance measurement, etc.). CFA Charterholders are also obligated to adhere to a strict Code of Ethics and Standards governing their professional conduct. More information on the CFA charter is available at www.cfainstitute.org.

CAIA - Chartered Alternative Investment Analyst

To earn a CAIA charter, an individual must have (a) obtained a bachelor’s degree (or the equivalent) and one year of qualified investment work experience or (b) four years of qualified investment work experience, and must become a member of the CAIA Association, pledge to abide by the CAIA Candidate and Member Agreement, and complete the CAIA Program. The CAIA Program is organized into two levels, each culminating in a four-hour exam.

CPA – Certified Public Accountant

CPA is the statutory title of qualified accountants in the United States who have passed the Uniform Certified Public Accountant Examination and have met additional state education and experience requirements for certification as a CPA. In most U.S. states, only CPAs who are licensed are able to provide to the public attestation (including auditing) opinions on financial statements. In order to become a CPA in the United States, a candidate must sit for and pass the Uniform Certified Public Accountant Examination (Uniform CPA Exam), which is set by the American Institute of Certified Public Accountants and administered by the National Association of State Boards of Accountancy. In addition to the CPA exam, most states also require the completion of a special examination on ethics and that specific education and work experience minimums are met. CPAs are also required to take continuing education courses in order to renew their license. Requirements vary by state but the majority of states require 120 hours of CPE every three years with a minimum of 20 hours per calendar year.