



Evercore Wealth Management Names Kait Oliveira as Managing Director, Portfolio Manager

NEW YORK, October 1, 2025 – Evercore Wealth Management today announced the appointment of Kait Oliveira as managing director and portfolio manager. She advises ultra-high-net worth families, business owners, financial professionals and senior corporate executives, delivering tailored investment strategies that integrate disciplined portfolio construction with deep investment analysis, to help clients grow and preserve wealth across generations.

Ms. Oliveira joins Evercore from Clarfeld Wealth Partners at Citizens Private Wealth, where she served as an investment manager and a private wealth advisor. She earlier worked at J.P. Morgan Private Bank as a client advisor, an investment professional and an analyst.

“We are happy to welcome Kait to our national firm,” said Chris Zander, CEO of Evercore Wealth Management and Evercore Trust Company. “Her experience in helping individuals and families define and achieve their financial goals, along with her investment expertise, makes her a natural fit for our firm.”

Ms. Oliveira earned a B.S. in business administration with a concentration in financial market regulation from the University at Albany, State University of New York. She holds both the Chartered Financial Analyst (CFA) and Certified Financial Planner (CFP®) designations.

Ms. Oliveira is based at the New York headquarters of Evercore Wealth Management and Evercore Trust Company.

About Evercore Wealth Management

Evercore Wealth Management LLC, a subsidiary of Evercore Inc., serves high-net-worth families, foundations and endowments across the United States, delivering customized strategic wealth planning, investment management and trust and custody services. The firm manages \$14.4 billion in client assets as of June 30, 2025. Additionally, Evercore Wealth Management offers personal trust and custody services to its clients through its Wilmington, Delaware-based affiliate Evercore Trust Company N.A., a national trust bank regulated by the Office of the Comptroller of the Currency. More information about planning, investing and personal fiduciary services at Evercore Wealth Management and Evercore Trust Company N.A. can be found at www.evercorewealthandtrust.com.

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