

## Disclosure Pursuant to the City of Pasadena Taxpayer Protection Amendment Pasadena City Charter, Article XVII

Contractor/Organization hereby discloses its trustees, directors, partners, officers, and those with more than 10% equity, participation, or revenue interest in Contractor/Organization, as follows:

*(If printing, please print legibly. Use additional sheets as necessary.)*

<b>1. Contractor/Organization Name:</b> Hyas Group, a separate business unit within Morgan Stanley Institutional Investment Advisors LLC
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<b>2. Type of Entity:</b> <input checked="" type="checkbox"/> non-government <input type="checkbox"/> nonprofit 501(c)(3), (4), or (6)
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<b>3. Name(s) of trustees, directors, partners, officers of Contractor/Organization:</b> Please refer to <a href="https://www.morganstanley.com/about-us/leadership">https://www.morganstanley.com/about-us/leadership</a> for Morgan Stanley's organization and leadership team, including the firm's Board of Directors and Operating Committee.

<b>4. Names of those with more than 10% equity, participation or revenue interest in Contractor/Organization:</b> Morgan Stanley is a publicly traded bank holding company (NYSE: MS) and is thus owned by shareholders.

Prepared by:   Dale Parker  

Title:   Executive Director  

Phone:   971-634-1500  

Date:   9/18/2023  



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*(If printing, please print legibly. Use additional sheets as necessary.)*

**1. Contractor/Organization Name:**  
CAPFINANCIAL PARTNERS, LLC ("CAPTRUST")


**2. Type of Entity:**  
 non-government     nonprofit 501(c)(3), (4), or (6)

**3. Name(s) of trustees, directors, partners, officers of Contractor/Organization:**

MILLER, JAMES, FIELDING	CHIEF EXECUTIVE OFFICER
HOYLE, WILSON, SMITH	MANAGING DIRECTOR
GOLDSTEIN, BENJAMIN, STUART	PRESIDENT
BUCHANAN, DENISE, MCGEE	CHIEF COMPLIANCE OFFICER
SHOFF, DERICK, DON	MANAGING DIRECTOR
MATHESON, SCOTT, THOMAS	MANAGING DIRECTOR
MARKELL-BALLEZA, CHRISTINA	MANAGING DIRECTOR, GENERAL COUNSEL

**4. Names of those with more than 10% equity, participation or revenue interest in Contractor/Organization:**

THE CAPFINANCIAL GROUP LLC OWNS 100% OF CAPFINANCIAL PARTNERS, LLC
CAPFINANCIAL HOLDINGS, INC. OWNS BETWEEN 25-50% OF THE CAPFINANCIAL GROUP LLC
HALFTIME HOLDINGS LLC JUST OVER 25% OF CAPFINANCIAL HOLDINGS, INC.
GTCR FUND XII/B LP OWNS 100% OF HALFTIME HOLDINGS LLC

Prepared by:   
DENISE M BUCHANAN  
Title: CHIEF COMPLIANCE OFFICER  
Phone: 919-278-9641  
Date: 9/15/2023

