

# QUARTERLY SHAREHOLDER REPORT

## FY 2024 - Q4

#### GROWTH

We continued our strategic growth this quarter, celebrating two grand openings and solidifying our presence in new regions. Grand opening ceremonies in Kerrville, our 11th branch in Central Texas, and Rio Grande City, our 14th in the Rio Grande Valley, highlighted our commitment to fostering lasting relationships with the individuals, families, and businesses that drive these communities forward.

We concluded 2024 with a significant expansion of our Houstonarea footprint, opening the doors to our new Rosenberg banking center and breaking ground at our new Magnolia location. As we continue to grow in the region with our third and fourth branches, we reinforce our dedication to serving the dynamic communities of Montgomery and Fort Bend Counties and demonstrate our longterm investment in the Houston area through 2025 and beyond.

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### COMMUNITY

We had a standout weekend at the Independent Bankers Association of Texas (IBAT) annual convention, where TRB was honored with the Community Spirit Gold Eagle Award for our Signature Shrimp Boil, which raised over \$85,000 for local nonprofits in 2023. Adding to the celebration, our Chief Strategic Planning Officer, Tracy Harris, was appointed Chair of the IBAT Board of Directors.

Two key initiatives this quarter exemplified our core values. We celebrated ten years of our UNT tailgating tradition, uniting alumni, local families, clients, and fans through shared pride in football and Texas BBQ. We also reinforced our dedication to community wellbeing with a \$75,000 donation to the Ronald McDonald Care Mobile® program, helping underserved families in South Texas access essential dental care.

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#### PEOPLE

Trust & Wealth Management added two seasoned professionals: Woodmir Gervais, Wealth Management Advisor, and Tanya T. Castro, Wealth Strategist. Joining our team in McAllen, Gervais brings over 15 years of corporate banking experience specializing in risk management. Castro, with 20 years of estate planning and client development expertise, will focus on expanding our wealth management services in Houston.

In North Texas, we appointed Dennis Wright as Executive VP of North Dallas Commercial Banking and Nick Davis as Lending Officer in the Park Cities Market. Wright, with over 30 years of corporate and middle-market banking experience, will lead new initiatives across North Dallas. Davis joins our Park Cities team to provide tailored commercial lending services and strengthen client relationships ahead of the branch's early 2025 opening.

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1800+ SERVICE HOURS



113 VOLUNTEERS



252 UNIQUE ORGANIZATIONS



20 COUNTIES ACROSS TEXAS



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