

# Atalanta Sosnoff Management, LLC

## Part 2B of Form ADV

### Firm Brochure Supplement

505 Fifth Avenue, 17<sup>th</sup> Floor  
New York, NY 10017  
(212) 867-5000

<http://www.atalantasosnoff.com>

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This brochure supplement provides information about Craig Steinberg, Robert Ruland, Matthew Ward, Joseph Sileo, Gerald Thunelius, and Robert Ohanesian. It supplements Atalanta Sosnoff Management, LLC's ("ASM") accompanying Form ADV brochure. If you have any questions about the contents of this brochure supplement, please contact us at 212-867-5000 and/or via email at [coo@atalantasosnoff.com](mailto:coo@atalantasosnoff.com). The information in this brochure supplement has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

Additional information about Messrs. Steinberg, Ruland, Ward, Maresca, Sileo, Ohanesian, and Thunelius is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Craig Benedict Steinberg's Biographical Information**

Born 1961 - President, Chief Investment Officer, Portfolio Manager & Member of the Investment Committee of Atalanta Sosnoff Capital, LLC ("ASC"). ASM is a wholly owned subsidiary of ASC and the investment decisions made on behalf of ASM's clients are made or given by ASC's Investment Committee and Portfolio Managers. Mr. Steinberg joined the Company in 1985 as an Analyst and has been a Portfolio Manager and member of the Investment Committee since 1988. Prior to joining the Company, Mr. Steinberg was a Securities Analyst for Prudential Equity Management. Mr. Steinberg earned a B.S.E. degree from the Wharton School of the University of Pennsylvania. Mr. Steinberg became CIO in December 2016.

### Disciplinary Information

Mr. Steinberg has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Steinberg, ASC or ASM.

### Other Business Activities

Mr. Steinberg is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of ASC or ASM.

### Additional Compensation

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

### Supervision

Mr. Steinberg's investment recommendations are supervised by ASC's Investment Committee. Mr. Steinberg's activities are also overseen by the Chief Compliance Officer, Michael R. Kuchler. Any of these individuals can be reached directly by calling the telephone number on the cover of this brochure supplement.

## Robert “Bob” Fred Ruland’s Biographical Information

Born 1968 - Portfolio Manager, Director of Research & Member of the Investment Committee of Atalanta Sosnoff Capital, LLC (“ASC”). ASM is a wholly owned subsidiary of ASC and the investment decisions made on behalf of ASM’s clients are made or given by ASC’s Investment Committee and Portfolio Managers. Mr. Ruland joined the Company in 2002 as a Research Analyst and was promoted to Portfolio Manager and member of the Investment Committee in 2006 and was named Co-Chief Investment Officer of Equities in December 2023... Prior to joining the Company, Mr. Ruland was a Research Analyst at Eagle Growth Investors, LLC and a Research Analyst at Lehman Brothers (from 1995 to 1999) and Banc of America Securities (from 1999 to 2001). Mr. Ruland earned a B.S. degree in Finance from the State University of New York at Albany and an M.B.A. from New York University and is a Chartered Financial Analyst.<sup>1</sup> Mr. Ruland became Director of Research in December 2016.

### Disciplinary Information

Mr. Ruland has not been involved in any legal or disciplinary events that would be material to a client’s evaluation of Mr. Ruland, ASC or ASM.

### Other Business Activities

Mr. Ruland is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of ASC or ASM.

### Additional Compensation

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

### Supervision

Mr. Ruland’s investment recommendations are supervised by ASC’s Investment Committee. Mr. Ruland’s activities are also overseen by the Chief Compliance Officer, Michael R. Kuchler. Any of these individuals can be reached directly by calling the telephone number on the cover of this brochure supplement.

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<sup>1</sup> The **Chartered Financial Analyst (CFA)** designation is an international professional certification offered by the CFA Institute (formerly AIMR) to financial analysts who complete a series of three examinations. To become a CFA Charterholder, candidates must pass each of three six-hour exams, possess a bachelor’s degree from an accredited institution (or have equivalent education or work experience) and have 48 months of qualified, professional work experience. 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.

## Matthew “Matt” Waring Ward’s Biographical Information

Born 1973 - Portfolio Manager & Member of the Investment Committee. Mr. Ward joined ASC in 2018 as a Research Analyst and was promoted to Portfolio Manager and member of the Investment Committee in 2021 and was named Co-Chief Investment Officer of Equities in December 2023. Prior to joining ASC, Mr. Ward was employed as a Head of Large Cap and Fund manager for Schroder Investment Management. Mr. Ward earned a B.A. degree in Economics from the Georgetown University and is a Chartered Financial Analyst<sup>2</sup>.

### Disciplinary Information

Mr. Ward has not been involved in any legal or disciplinary events that would be material to a client’s evaluation of Mr. Ward, ASC or ASM.

### Other Business Activities

Atalanta Sosnoff Management, LLC (“ASM”) is a wholly owned subsidiary of ASC. The ASC Investment Committee and certain Portfolio Managers provide the investment decisions to ASM’s clients.

### Additional Compensation

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

### Supervision

Mr. Ward’s investment recommendations are supervised by ASC’s Investment Committee. Mr. Ward’s activities are also overseen by the Chief Compliance Officer, Michael R. Kuchler. Any of these individuals can be reached directly by calling the telephone number on the cover of this brochure supplement.

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## **Richard Maresca's Biographical Information**

Born 1957 – Senior Managing Director and member of the Fixed Income Committee. Mr. Maresca joined ASC in March 2004 as Managing Director of the Jointly Truited Division where his duties include review of securities portfolios and asset allocation with certain clients as well as marketing and client service duties. Prior to joining ASC, Mr. Maresca served in similar capacities for Harbor Capital Management (from 2000 to 2004) and Alliance Capital Management (from 1993 to 1999). Mr. Maresca earned a B.B.A. Degree from Baruch College and a M.B.A. from Pace University.

### Disciplinary Information

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

### Other Business Activities

Atalanta Sosnoff Management, LLC ("ASM") is a wholly owned subsidiary of ASC. The ASC Investment Committee and certain Portfolio Managers provide the investment decisions to ASM's clients.

### Additional Compensation

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

### Supervision

Mr. Maresca's activities are also overseen by the Chief Operating Officer and Chief Compliance Officer, Michael R. Kuchler. Any of these individuals can be reached directly by calling the telephone number on the cover of this brochure supplement.

## Joseph “Joe” Victor Sileo Jr.’s Biographical Information

Born 1957 – Managing Director, Senior Fixed Income Portfolio Manager and member of the Fixed Income Committee. Mr. Sileo joined the Company in 2004 as a fixed income portfolio manager where his duties also include marketing and client service to the Jointly Trusteed Division of the Company and Portfolio Management to ASC and ASM. He is the Co-Director of Core Fixed strategies. Prior to joining the Company, Mr. Sileo served in similar capacities at Harbor Capital Management (from 2000 to 2004), Alliance Capital Management (from 1994 to 2000), Shields Asset Management (from 1988 to 1994) and Bank of New York. Mr. Sileo earned a B.A. from State University of New York at Oswego and a M.B.A from Pace University and is a Chartered Financial Analyst<sup>3</sup>.

### Disciplinary Information

Mr. Sileo has not been involved in any legal or disciplinary events that would be material to a client’s evaluation of Mr. Sileo, ASC or ASM.

### Other Business Activities

Mr. Sileo is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of ASC or ASM.

### Additional Compensation

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

### Supervision

Mr. Sileo’s investment recommendations are supervised by ASC’s Investment Committee. Mr. Sileo’s activities are also overseen by the Chief Compliance Officer, Michael R. Kuchler. Any of these individuals can be reached directly by calling the telephone number on the cover of this brochure supplement.

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<sup>3</sup> The **Chartered Financial Analyst (CFA)** designation is an international professional certification offered by the CFA Institute (formerly AIMR) to financial analysts who complete a series of three examinations. To become a CFA Charterholder, candidates must pass each of three six-hour exams, possess a bachelor’s degree from an accredited institution (or have equivalent education or work experience) and have 48 months of qualified, professional work experience. 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.

## **Gerald “Jerry” Thunelius Biographical Information**

Born 1964 – Managing Director, Senior Fixed Income Portfolio Manager and member of the Fixed Income Committee Manager, Co-Director of Core Fixed strategies and Portfolio Management to ASC and ASM. Mr. Thunelius joined ASC in 2016 as a senior fixed income portfolio manager. Previously, he served as a senior fixed income portfolio manager for Atlantic Asset Management, Cuttwater Holdings LLC, Dreyfus Corporation and Oppenheimer. He has worked with major publications, including Barron's, Fortune, the Wall Street Journal, as well as a guest contributor to Forbes. He earned his BBA in Finance from Dowling College.

### Disciplinary Information

Mr. Thunelius has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Thunelius, ASC or ASM.

### Other Business Activities

Atalanta Sosnoff Management, LLC (“ASM”) is a wholly owned subsidiary of ASC. The ASC investment Committee and certain Portfolio Managers provide the investment decisions to ASM's clients.

### Additional Compensation

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

### Supervision

Mr. Thunelius' activities are also overseen by the Chief Compliance Officer, Michael R. Kuchler. Any of these individuals can be reached directly by calling the telephone number on the cover of this brochure supplement.

## **Robert “Bob” Mark Ohanesian’s Biographical Information**

Born 1949 - Prior to joining Atalanta, Mr. Ohanesian served in the positions of CEO and CIO of Fixed Income at ICC Capital Management. Prior to that, Mr. Ohanesian was President of Ryan Labs in New York; served as CEO and CIO of Harbor Capital Management in Boston; established and served as President and Chief Portfolio Strategist of MBIA Capital Management; and was Chief fixed income strategist/portfolio manager for Shields Asset Management, a division of Alliance Capital Management. Mr. Ohanesian also served as Deputy Director for the 1980 Olympic Winter Games. He received his B.A. from Clemson University and has a Master’s Degree in Public Administration from Pennsylvania State University. Mr. Ohanesian has served as assistant professor of finance at the Lubin Graduate School of Business at Pace University

### Disciplinary Information

Mr. Ohanesian has not been involved in any legal or disciplinary events that would be material to a client’s evaluation of Mr. Ohanesian, ASC or ASM.

### Other Business Activities

Atalanta Sosnoff Management, LLC (“ASM”) is a wholly owned subsidiary of ASC. The ASC Investment Committee and certain Portfolio Managers provide the investment decisions to ASM’s clients.

### Additional Compensation

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

### Supervision

Mr. Ohanesian’s investment recommendations are supervised by ASC’s Investment Committee. Mr. Ohanesian’s activities are also overseen by the Chief Operating Officer and Chief Compliance Officer, Michael R. Kuchler. Any of these individuals can be reached directly by calling the telephone number on the cover of this brochure supplement.