

FRONTENAC HERITAGE

WEALTH MANAGEMENT GROUP

of Wells Fargo Advisors

September 2024
Issue 3

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The latest news, views, and announcements

FHWMG Newsletter

Our team quarterly
newsletter

INSIDE



Team Spotlight

Jim McAtee
Managing Director -
Investments

James K. McAtee
Managing Director - Investments

William B. Gladney
Managing Director - Investments
PIM Portfolio Manager

J. Kevin McAtee, AAMS®
Managing Director - Investment Officer
PIM Portfolio Manager

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Senior Vice President - Investment Officer

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Managing Director - Investments

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Assistant Vice President - Senior Registered Client Associate

Crystal J. Harris
Financial Advisor

Jenna N. Gornicz
Financial Consultant

Elmela Imamovic
Client Associate

Julie Hickert
Client Associate

Frontenac Heritage Wealth Management Group of Wells Fargo Advisors is dedicated to helping our clients organize their financial lives comprehensively, going well beyond asset management to address the whole of their wealth management needs. Together, our mission is to provide sound professional advice and superior service. We are fully invested in you.

Investment and Insurance Products:

Not FDIC Insured

No Bank Guarantee

May Lose Value

Frontenac Heritage Wealth Management Group

TEAM SPOTLIGHT

Meet Jim McAtee, Managing Director - Investments

Jim McAtee, often referred to as the elder statesman of our team, recently celebrated his 40th anniversary with our firm, and nearly 55 years as an investment advisor. We like to think that he brings the element of wisdom to our group, as his long experience advising clients, managing other advisors and always being available serves us well.



Jim is a strong advocate of the team approach, working with others to achieve substantive results, whether in sports, work, community involvements, as well as his relationships with friends and family. This team spirit permeates our entire Frontenac Heritage Wealth Management Group and we believe brings real value to our clients.

Jim has many extracurricular interests, including his family, St. Louis Priory, Georgetown University, the U.S. Marine Corps and a variety of charitable endeavors over the years.

Jim and his wife, Pat, have had the good fortune of being able to travel extensively during their 55-year marriage, including visits to six continents and all 50 U.S. States, often with his children and grandchildren.



Copenhagen



Pat and Jim in Ireland



Ted Lasso Town

And finally, Jim likes to say that a good life should be focused upon the four F's - Faith, Family, Friends and Flag. He believes that "Every day is an opportunity to help someone, or two or three".



Jim and Pat with Brigid at Mary Queen of Peace



Priory Boys - Jim, Jack, Jake & Kevin



Charley Girl



Semper Fi