

# FRONTENAC HERITAGE

WEALTH MANAGEMENT GROUP

*of Wells Fargo Advisors*

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10369 Clayton Road  
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The latest news, views, and announcements

## FHWMG Newsletter

Our team quarterly  
newsletter

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### 2024 Recap

Thank You!

#### **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

#### **Mark P. Talbott, CFP®**

Senior Vice President - Investment Officer

#### **Matthew S. Alpert**

Managing Director - Investments

#### **Maureen Q. Ragsdale**

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

## 2024 RECAP

## THANK YOU!

As we close out an amazing and tumultuous 2024, we at Frontenac Heritage Wealth Management Group want to take a moment to thank you for being along for the ride with us. 2024 brought many unforeseen things: wild changes in the political landscape, continued geopolitical challenges and strife around the globe, plus advents and advancements in amazing technologies and innovations that will change our world for years to come. One thing is for sure, 2025 will continue to bring changes, risks and opportunities. Your trust in us as we help guide you and your families continues to humble us and make us proud and excited to come to work every single day and excited to continue our journey with you as we approach the new year and beyond.



Our team would like to relay some of the milestones and accomplishments we have reached and which made our 2024 special. Our team and clients continued to come together for great celebrations and get-togethers like our annual Pumpkin Patch event in October, the Social Security seminar that we held at Westborough Country Club in February along with multiple “Shred Events” held at our branch where many came with boxes of old documents to shred and to get a donut and some coffee. We look forward to continuing these types of events in 2025 as well as to add some others to the calendars as we look for more reasons to get together with you to share information and goodwill. Keep an eye on those mailboxes and Inboxes!

On personal notes, we are excited to announce that Jenna Gornicz, Financial Consultant, has been asked to enter the New Advisor Development Program within Wells Fargo Advisors. This new adventure for her will enhance her already tremendous skills as well as provide a deepening of her leadership capabilities. She will be entering into this multi-year program in February 2025 and we can't wait to see how her continued professional growth can positively impact our relationships with clients. Julie Hickert, Client Associate, is looking forward to a new grandbaby in April. Matt Alpert, Managing Director – Investments, will also be expanding his family as his daughter, Katherine, is getting married in August.

One aspect of our team that fills us with pride is our leadership when it comes to giving our time to charitable endeavors. We take the helm in our branch in raising money for Toys For Tots every year and Crystal does an amazing job of going out and purchasing toys to help make a great Christmas season for grateful kids in our region. This year's haul was spectacular! Mo continues to lead the charge in these fundraising events through the annual Frontenac Chili Cook-off and the now twice a year Frontenac (miniature) golf tournaments that Mark, Kevin and Bill also help set up around the corridors of our building. This combination of fundraising and camaraderie adds to the special atmosphere that exists in our work environment.



Additionally, Jim McAtee, Managing Director – Investments, was again involved in the annual fundraiser for the Semper Fi & Americas Fund. Another huge success for the betterment of the lives of wounded Marines and all other military branches, and their families. The event brings all of us together for a great cause. And notably, as the first rest stop for “marchers” participating in the March to the Arch, an annual event held on September 11<sup>th</sup> where scores of people walk over 20 miles with American flags in hand to show remembrance for the lives lost twenty-three years ago, Julie, Elmela and the team helped welcome the marchers and provide them with the hydration and sustenance needed for the rest of the journey. We are truly proud to be involved in all of these great opportunities to serve others.



As we enter 2025, we want to wish success, health and happiness for you, your families and loved ones. And we look forward to continuing to be your trusted advisors and support.

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