

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

INSIDE



**2025 Forbes
Best-in-State**

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
Associate Vice President - Investment Officer

Jenna N. Gornicz
Financial Advisor

Elmela Imamovic
Senior 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
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Frontenac Heritage Wealth Management Group

2025 FORBES BEST-IN-STATE WEALTH MANAGEMENT TEAMS

We are proud to announce that our team, Frontenac Heritage Wealth Management Group of Wells Fargo Advisors, was recognized on the 2025 Forbes Best-in-State Wealth Management Teams List¹. This recognition serves as a reminder that we are committed to working everyday toward the financial success of our clients.

We strive to go beyond investments and provide clarity to your financial future. With the experience, resources and technology we hope to connect your long-term planning and investments to what is important in your life. In February, we hosted an event at Westborough Country Club with Kevin Carevic, Wealth Management Consultant at Capital Group American Funds, which focused on the 2025 Economic Market Outlook. Kevin had great client engagement and provided insight on what Capital Group American Funds projects for the year. The team enjoyed everyone's company. Unfortunately, Maureen Ragsdale and Crystal Harris missed the event due to illnesses that day. We look forward to providing more educational events in the future and welcome suggestions on our future topics.



Pictured: Elmela Imamovic, Julie Hickert, Kevin McAtee, Jenna Gornicz, Bill Gladney, Mark Talbott, Jim McAtee, Kevin Carevic and Matt Alpert.

We hope your 2025 is off to a good start! We look forward to supporting you and those important to you in the future.

¹2025 Forbes Best-in-State Wealth Management Teams: Awarded January 2025; Data compiled by SHOOK Research LLC based on the time period from 3/31/23 - 3/31/24 (Source: Forbes.com). The Forbes Best-in-State Wealth Management Teams rating algorithm is based on the previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria. 11,674 wealth management teams were considered for the rating; 5,331 (45.66% percent of candidates) were named 2025 Forbes Best-in-State Wealth Management Teams.