



## Market Outlook & Introducing: In the Forecast

Posted on May 15, 2023

Dear Valued Clients,

I am delighted to welcome you to the first edition of our newsletter, In the Forecast. We are also excited to announce the recent addition of several outstanding professionals to our team. We have onboarded William Hamelin, a principal consultant from The Adept Group, and James Cawley, a licensed insurance specialist from Equitable Insurance, who have joined our team to bolster our capabilities. Additionally, we welcome Nicole Uhlmann as our new General Counsel, Gary Rosas as Manager of Operations and Ana Villalobos as our Controller. These exceptional individuals bring a wealth of experience and knowledge to our company, and I am confident they will make significant contributions to our continued success.

In our ongoing effort to provide the best possible service to our clients, we are excited to introduce Strategy Asset Managers Insurance Services. As part of this new initiative, we are extending an exclusive offer to our clients for a second opinion on their existing life insurance policies. This service aims to ensure that our clients have the most suitable and cost-effective policies in place, tailored to their unique needs and circumstances. We believe that by helping our clients make

informed decisions about their insurance, we contribute to their long-term financial well-being. Furthermore, our commitment to acting as a liaison for our clients in every aspect of their lives is unwavering. Our extensive referral networks our PAs, attorneys, and trustees allows us to connect clients with specialists across various fields, ensuring that they have access to the best resources and advice for their needs. As your trusted advisors, we aim to be the central point of contact, seamlessly coordinating and managing all aspects of your financial life. If you want to learn more about how insurance fits into your financial puzzle, give the office a call at 626-657-0559.

Additionally, we are proud to announce our collaboration with leading real estate firm, Compass. This partnership enhances our expertise, allowing us to deliver real estate evaluations, comparables, and market insight to our clients. This connection further reinforces our dedication to offering a diverse range of services and resources, tailored to meet the ever-evolving needs of our clients.

Thank you for your continued trust and loyalty as we work to provide exceptional service and support. We are excited to embark on this new chapter together and look forward to serving you with excellence in all aspects of your financial journey.

Best Regards,  
**Tom Hulick**  
CEO