



To all our clients and friends:

I have been privileged to work for this organization for 30 years and have been honored to serve as our CEO since 2015.

2024 marks an extraordinary milestone in our history - our 40th anniversary! As I reflect on this, I feel it's important to pay tribute to the commitment and dedication of all the members of our Investmark family, past and present, who have made our organization what it is today - a leader in providing comprehensive, consultative wealth management services and guidance.

This is an exciting time, and several initiatives are planned to commemorate this special occasion, including the creation of our commemorative 40th anniversary logo and our re-designed website.

I would be remiss if I did not acknowledge the entrepreneurial vision of our founder, Bob Parker, who realized earlier than most that Wall Street firms were not the best model for serving clients' best interests and that an independent firm - not beholden to shareholders and corporate interests - could offer clients a more comprehensive, personalized, and effective experience.

This vision was further realized when Bill Bowman joined, leading to the birth of Investmark. Jay Diamond came on board a few short years later and was instrumental in our evolution as an independent, client-centric, financial planning firm.

I would also like to acknowledge Rich Pease, who joined the firm at the start as a highly accomplished advertising executive. He was instrumental in creating Investmark's logo and signature message, which is still in use today - "The Direction of Wealth."

I am happy that Bob, Bill, and Rich are enjoying retirement, and I am sure they are proud that Investmark is stronger than ever. On behalf of our current team of professionals and our more than 500 clients, I salute your outstanding careers, integrity and guidance!

Additionally, It is very exciting to announce that Investmark passed the \$1 billion mark in assets under advisement this year (as of 7/12/2024) - a significant milestone for our firm. As I look ahead, our current team of leaders, professionals, and staff is undoubtedly the most substantial, well-rounded group we have ever had, and I am confident and excited about our continuing evolution. While most of you know my colleagues quite well and don't need convincing, you can find out more about our team on our website, www.investmark.net at your convenience.

Most importantly, I want to sincerely thank you and all our clients for the opportunity to help you pursue your goals with confidence. We look forward to helping you reach many more milestones in the years ahead!

Best regards,

Mike Kusick, CFP®
CEO



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