A Message From Our CEO

Recent Professional Development Milestones 2022

To Our Clients:

Michael C. Kusick, CFP®
CEO

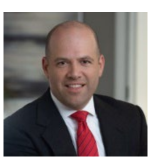
I want to take a few moments to report on the current state of our firm, highlight some internal changes, and speak to our mission and our efforts to provide you with a level of advisory excellence and service that exceeds your expectations.

As we finally seem to be getting close to 'back to normal' in terms of the Covid situation, the geopolitical crisis in Ukraine and inflation at home are taking center stage. While I don't want to address these issues in detail here, I do feel that it is an appropriate time to remind you that we are here for you through all market environments. In fact, I believe that Investmark is stronger and more capable than ever. Our team is constantly evolving and improving and is well positioned to serve you and your family for generations to come.

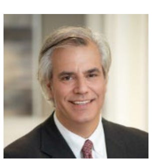
After nearly 40 years, our purpose is still to empower you and every Investmark client with a wealth management plan that gives you confidence, security and positive options to pursue your dreams. We are only as successful as our clients, and we are resolute in our commitment to serving your financial interests.

With that in mind, I am particularly proud of our ensemble approach and firmly believe that this greatly improves your experience. We work as a team and our goal is to always get you the assistance or solution you need as efficiently and effectively as possible, and we will get you to the best person for each request. This means your advisor and our staff can focus where they are most effective, and you get what you need without unnecessary delays, whether that be tax information, technology assistance, paperwork, or investment guidance. You will always get to talk to a real person – and the right person.

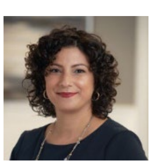
The professional growth and development of our team is a key ingredient in our firm's longevity. As Investmark grows and strives to meet and anticipate our clients' needs, members of our team have been evolving into new roles and responsibilities and we are thrilled to announce the following promotions:



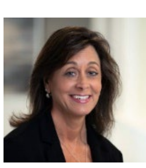
Nick Christie, CFP® - Chief Operating Officer and Chief Investment Officer. Nick has been at Investmark since 2000 and has developed into one of our most experienced Wealth Managers and Investment Advisors. Additionally, we have all come to rely on Nick's investment portfolio and operational oversight. We are looking forward to Nick's continued leadership in these areas to ensure we can deliver competitive, appropriate financial planning and asset management solutions.



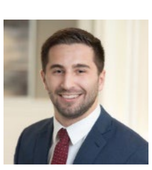
Scott Williams - Chief Compliance Officer. With a constantly changing and ever more rigorous regulatory landscape, we have been keeping pace with a vastly increased dedication and focus on compliance and regulation. Scott has been with Investmark for over 25 years and we are very excited to have him take on more responsibility and leadership is this important area.



Kim Lopez - Operations Manager. Kim started with Investmark in 2014 and has become an indispensable member of our team. We are excited about having Kim serve in this very important leadership role in our Client Services Department.



Lisa Walsh - Office Manager. Lisa has been making a significant impact to our firm from the moment she joined in 2014. Her exceptional organizational skills and ability to oversee all aspects of the day-to-day management of the office has resulted in making us all more productive and free to focus on serving our clients.



Nick Giammattei, CFP® - Lead Advisor. Nick joined us in 2018 as an Associate Advisor. Since then, he has been committed to developing his skills and education. In 2021, he passed the CFP® Certification Examination and became a CERTIFIED FINANCIAL PLANNER™ professional. Nick has been an invaluable member of our team and will be focused on working directly with our clients and managing their wealth management plans for years to come.

Investmark Advisory Group

Corporate Offices: 3 Enterprise Drive, Suite 401 ♦ Shelton CT 06484 ♦ 203.953.3777 800.443.1006 F 203.386.8300