

Dear Friends, Clients, and Partners,

Happy New Year! As we begin 2026, we want to take a moment to reflect on the past year, share a few important updates, and look ahead with confidence and optimism.

The past year brought continued change across the world, the economy, and the financial markets. While uncertainty remains a constant, innovation within both the investment and insurance marketplaces continues to create new opportunities and solutions. Our focus remains unchanged: disciplined planning, thoughtful strategies, and helping you make informed decisions—regardless of short-term market noise.

An Important Update and a New Chapter

Over the past year, our firm experienced an internal transition. J. Ryan Bickel is no longer affiliated with our practice. As a result, we are excited to announce the launch of a **new firm name and updated logo**. This rebrand reflects who we are today and the direction we are heading, while remaining grounded in the same values, planning philosophy, and client-first approach that have guided us for decades.

Importantly, this change has **no impact on your accounts, investments, or financial plans**. LPL Financial remains our broker/dealer, and we continue to provide the same comprehensive wealth management, investment, insurance, and planning services. Our new website will be launching soon, along with updated email addresses. Existing email addresses will continue to work throughout the coming year, and LPL email addresses will always remain available.

Growth, Recognition, and Continued Expertise

This year marked an important professional milestone as Brett earned the **Accredited Estate Planner® (AEP®)** designation, further enhancing our ability to coordinate estate, tax, and legacy planning alongside your trusted legal and tax professionals.

We were also honored once again to receive several awards, including Best of Coweta*, NAIFA Georgia Top 40 Under 40*, Five Star Professional Wealth Manager*. While these recognitions are appreciated, the trust you place in us—and the referrals you share—remain the greatest measure of our success.

Technology and Team Enhancements

LPL continues to expand technology designed to improve your experience, including the ability to link outside accounts within your LPL Client View app for a more complete financial picture. In the coming months, you may receive paperwork related to enhanced account linking and compliance upgrades that allow us to serve you even more effectively.

We are also preparing to introduce **Jump AI**, which—with your permission—will securely capture meeting notes and follow-ups, allowing us to focus even more on strategy and outcomes. Additionally, we are pleased to welcome **Hannah** to our team, supporting operations and administration as our firm continues to grow.

Thank You

We are deeply grateful for your continued confidence and referrals. Your trust allows us to grow thoughtfully, invest in better tools, and build a firm designed to serve you today and for generations to come.

Wishing you and your family a happy, healthy, and prosperous New Year. We look forward to another year of working together.

With gratitude,



Brett L. Moore, CFP®, AEP®

*Best of Coweta based on reader votes. 5 Star - Award based on 10 objective criteria associated with providing quality services to clients such as credentials, experience, and assets under management among other factors. Wealth managers do not pay a fee to be considered or placed on the final list of 2025 Five Star Wealth Managers. NAIFA - 40 Under 40 nominations of advisers and associated professionals are evaluated based on: accomplishment to date, contribution to the industry, leadership and promise.