DAVIDSON
WEALTH MANAGEMENT
of Wells Fargo Advisors

A few updates about Davidson Wealth Management

Why we do what we do and stay where we are. Our mission is to serve our clients and their families, helping them manage their financial wealth, so that they can focus on their true wealth. We believe every life has a purpose. We are passionate about helping you achieve your goals and purpose. We are rewarded when we see you succeed at reaching various milestones in your life. It is our honor and privilege to do this work and be a part of your life's journey.

But, we are not alone. There are people who help us. They care for us the way we care for you. Our relationships in the St. Louis home office of Wells Fargo Advisors span many years. In our profession, people, not institutions, get things done. We all use technology, but often we pick up the phone and ask for help.

Here, in Davidson, NC, we celebrate milestones in our own personal lives.

- Harriet White recently became a grandmother.
- Chris Senvisky recently married.
- Michael Davis has a 16-month-old daughter and he and his wife, are expecting twins.
- Cherie Almaraz's daughter, was recently accepted to law school.
- Karen Kight's daughter recently passed the bar examination.
- Steve Giguere's son recently attained his second-level black belt.
- Jay Tillman and Nick Androvich recently moved their families into new homes.
- Celeste Renaldo is devoting more time as grandmother and Rotarian.
- Ben Doetzer completes his first full year on our team, joining from UNC Chapel Hill.

In 2018, because of the work and dedication of our entire team, I was given national recognition:

- 2018 Barron's Top Advisor Rankings: North Carolina, 12th. *
- 2018 Forbes Best-in-State Wealth Advisor Ranking, 6th North Carolina.*

Advisors recognized on these lists typically are the founders of a practice who have remained steadfast and client focused during industry turbulence, mergers, and financial crises. They are passionate about what they do, would do it under any name, and undeservingly, get the credit that their teammates deserve.

Lastly, you should know when it comes to planning; we are planning for two futures; yours and ours. We are already advising a third generation of family members. We "envision" advising your children and grandchildren, providing financial literacy and direction. We are building for this future purpose.

I speak for our entire team when I say, we are respectfully yours,

Chris Davis

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*The rankings are based on data provided by thousands of advisors. Factors included in the rankings were assets under management, revenue produced for the firm, regulatory record and client retention.

*Ranking algorithm based on industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC, which does not receive compensation from the advisors or their firms in exchange for placement on a ranking. Investment performance is not a criterion.