



October 1, 2025

Dear Clients,

We are excited to share some wonderful news with you. **Blaine McQuaid Pestle**, who you have come to know as our Registered Client Associate, is transitioning into **the role of Financial Advisor**. Blaine has demonstrated exceptional dedication, care, and expertise in serving our clients. We are so grateful for the trust and relationships she helped foster over the past 9+ years.

Blaine will now partner with me in a shared advisor role as we begin this new chapter. This natural progression and collaboration will allow us to offer you even greater support by providing expanded availability, a broader range of perspectives, and seamless service for your financial needs. Blaine and I will continue to focus on what matters most: preserving and strengthening the meaningful relationships we have built through the years by helping you pursue your goals with confidence.

Relationships have always been at the heart of why I started this career. It is an incredible privilege to be trusted with something as personal and meaningful as your financial future. I do not take that trust lightly. I have worked alongside Blaine for nearly a decade, and I have the utmost confidence in her abilities, her gentle and thoughtful approach to client relationships, and her dedication to the level of care you have come to expect.

We look forward to connecting with you over the coming months to learn more about your goals and support your financial journey in a way that feels personal, intentional, and long-term.

We deeply value your trust and loyalty, and we're excited about the opportunities this next step brings to better serve you. If you ever have any questions or simply want to touch base – we are here. Stop by the office anytime or give us a call.

Together, we look forward to working with you for many years to come.

With Gratitude,

Tim Borman
Senior Vice President
Financial Advisor