

Happy
NEW YEAR
2025

Wishing you peace, joy, & success
in the year ahead.



SILVERTREE
WEALTH PARTNERS
— *Ashland* —

Purposeful Wealth. Your Personal Legacy. Our Passion!

Tel: 541.201.8988
www.silvertreewp-ashland.com

YEAR IN REVIEW

As we reflect on 2024, I am filled with gratitude and excitement for all that we accomplished together. In addition to my ongoing commitment as your wealth advisor, I took a significant step forward in my professional growth by earning the Certified Exit Planning Advisor (CEPA) designation helping business owners plan for retirement. Working with each of you—whether guiding strategic investment & tax mitigation decisions, helping to navigate transitions in your lives, or collaborating on charitable giving initiatives—has continued to reinforce my passion for serving our families and successful entrepreneurs.

On a personal development note, I am finishing up my MBA coursework with expected graduation date of June 2025. This past fall, I completed a direct marketing course learning how to create one-on-one interactive marketing. As a result, you'll soon see a new STWP-Ashland website and social media posts on various platforms helping folks to make smarter financial decisions.

I have always wanted to build something meaningful to spend more time with my kids, friends & clients on the river. Soooo...I decided to build a drift boat (see photo on side) & hope to have it completed by summer.

It has been an honor to support your goals, & I look forward to building on this year's progress and opportunities in the year ahead.

