

Dear Valued Clients,

As we bid farewell to 2023 and welcome the new opportunities that await us, I'm thrilled to share some exciting highlights from the past year and express my heartfelt gratitude for your continued support.

Amidst mid-year market volatility, I'm delighted to announce that, thanks to the robust planning process and the performance of our investment strategies—we closed the year on a positive note. Your trust and confidence have played a crucial role in navigating challenges and contributing to our collective success.

I'm excited to introduce two new members to our RBM Wealth Management Group family—Mike Hines and Nick Krajniak. Their expertise enhances our team's capabilities, allowing us to better serve your financial needs.

On a personal note, I am honored to share that I've been voted into the prestigious Atlanta Estate Planning Council. Recognition in the Marquis Who's Who of America, Marquis Who's Who Emerging Leaders, NAIFA Georgia Leaders Council and the Million Dollar Round Table - Court of the Table further underscores our commitment to excellence.

Following a record-breaking year where I was named one of NAIFA's Top 4 under 40 in the nation, I continue to contribute to the financial industry. I have been named to and become an active board member for NAIFA Georgia and recently also joined Finseca. I am dedicated to staying at the forefront of industry best practices, ensuring RBM Wealth Management Group remains a leader in financial services.

I want to express my sincere thanks to those who have embraced RepChat, a powerful tool added at the end of 2021. Your use of this platform has allowed us to establish more instant and efficient communication channels with you, our valued clients. Your continued support and referrals have been instrumental, enabling us to uphold our commitment to serving you at the highest level while keeping our fees below industry standards.

Looking back at the milestones of 2023, I am grateful for the foundation we have built together. As we embark on the new year, our dedication to providing you with the best possible service remains unwavering, and we are committed to continuous improvement.

Thank you for your trust and partnership. I eagerly anticipate another year of growth and success together.

Best Regards,

Brett Moore, CFP®  
Managing Partner &  
Wealth Advisor  
RBM Wealth Management Group