

# Atlantic Retirement & Wealth Advisors LLC

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## Independent Business Advisory Board

The Independent Business Advisory Board is designed to advise the firm on strategic product and operational issues. Although it is not involved in day to day operational and client items, the advisory board plays a critical role in providing expertise and advice for the long term success of the firm. A board members service may include:

- Suggest projects, products and or services to current and future clients
- Deliver feedback on firm offerings, performance and services
- Bring expertise and relevant experience on firm objectives
- Provide guidance and mentorship to employees
- Drive outside resources for networking, sponsorships and or operational needs
- Present their opinions and or findings on pertinent firm and industry topics

Each Advisor brings us a diverse point of view. We appreciate their time and commitment as well as their confidence in Atlantic Retirement & Wealth Advisors LLC.

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### Abigail Sheppard

#### Investment Product and Client Strategic Advisor

Abigail has seven years of management experience in the hospitality industry where she has honed her skills and dedication to maintaining strong client service. She completed the Management Training Program at the Four Seasons Hotel in Washington DC where she forged strong global client relationships with guests including dignitaries from around the world. In addition to managing a diverse staff and financials, Abby drove a high level of client satisfaction with a Forbes Five Star Certification.

While completing her MBA with a concentration in Finance in 2024 at the University of Denver's Daniels Business School, Abby is a Sales & Marketing Manager within the Fritz Knoebel Business School. She has studied internationally and most recently has traveled to South Africa where she advised a small business on growth opportunities, financial projections and client segmentation. She affords a global view and insightful information on current market conditions and product offerings and how they best serve client interests, objectives and goals.

