



Join us during the Equus Events December Classics
December 12th @ 5:00 pm Bruce's Field
931 Powderhouse Rd
Aiken, SC 29803

A CHARITABLE



FOUNDATION



FOR IMMEDIATE RELEASE

November 26, 2024

AIKEN, SOUTH CAROLINA:

The Aiken Horse Park Foundation is pleased to welcome Nick Bertelli, Financial Advisor Raymond James & Associates, to Bruce's Field, **Thursday, Dec. 12th** during the Equus Events Aiken December Classics shows to lead a Financial Resolution Seminar catered to the equestrian community.

The purpose of this seminar is to aid equestrians, and more specifically equestrian professionals, in thinking and planning beyond their active career. Far too often, when riders, trainers, and even grooms reach retirement, they are left in serious financial instability. The goal of this evening is to give these essential personnel in our industry the tools to prevent that scenario.

Join us at the Hospitality Tent, located between Hunter Rings 1 & 2, **931 Powderhouse Rd, at 5:00 pm.** Light refreshments will be provided.

Cash strengths



Totally liquid



Daily needs



Emergency/
opportunity fund



A safe haven
in a down market

Investment strengths



Tax management
strategies



Growth
potential

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You should discuss any tax or legal matters with the appropriate professional.

Event sponsored by Nicholas Bertelli.

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RAYMOND JAMES
NICHOLAS BERTELLI

Successful Planning Begins With a Conversation



Nick Bertelli is a Financial Advisor with Raymond James in Augusta, Georgia. Originally from Northern California, Nick's passion for Equestrian sports, specifically Dressage, brought him to the South in 2012. He, and his family, are proud to call Aiken home.

Nick brings over 20 years as a professional athlete and small business owner in Equestrian coaching and training experience, to his role as a Financial Advisor. Helping elite riders and horses develop and train for top level competition, requires planning, dedication, hard work, and a unique approach to each client. These ingredients for success are applied to Nick's practice every day at Raymond James.

While focusing his business on each client's individual financial objectives, Nick believes the most successful wealth management strategies look at the big picture. It is this comprehensive, solution-focused approach, delivered with constant personal attention and a commitment to his clients' best interests, that sets Nick apart. As a member of the LGBTQ community, Nick is honored to be a resource for LGBTQ community members across the Southeast, seeking guidance in building and preserving their financial well-being.

Nick is dedicated to managing and preserving wealth for you and your family. By establishing deep and valued relationships with you, he can gain a comprehensive understanding of your unique needs and goals. Nick works hard to enhance and preserve your investments while assisting you in realizing your goals through long-term financial solutions using conservative portfolio management solutions, estate planning, generational wealth transfer, college saving planning, and retirement planning.

Nick graduated from the University of San Francisco with a B.S. in Economics. He is a United States Dressage Federation Gold and Silver medalist. When not working, Nick enjoys riding and coaching his students, as well as being with his family and partner and their many four-legged family members. He joined Raymond James in 2022.

Raymond James is not affiliated with the above organizations.

NICHOLAS BERTELLI
Financial Advisor

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A promotional banner for an equestrian event. On the left, a group of people are gathered around a horse. In the center, a rider on a dark horse is performing a dressage movement. On the right, the 'CONCEAL' logo is displayed in large blue letters, with 'Comprehensive Cyber Protection' underneath. To the right of the logo is the 'GPE' logo featuring a horse silhouette. Below the Conceal logo, it says 'PRESENTED BY THIS' in a red box, followed by 'EQUINE INSURANCE'. At the bottom, the text reads '\$100,000 - AN EVENT LIKE NO OTHER - FEB 28 & MAR 1, 2025 - AIKEN, SC' in large blue letters.

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ALL TICKETS GO ON SALE DEC 1ST

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2024 PARK SPONSORS



2024 Park Partners



Established in 2013 by the late R. Bruce Duchossois, the Aiken Horse Park Foundation received its IRS 501(c)(3) tax exempt status in November 2014, with a mission to promote Aiken's equestrian way of life and to encourage the community's civic, educational, and charitable endeavors

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