



July 13, 2023

Greetings from your financial fiduciary team! We hope all of you are enjoying this warm summer. We are writing to inform you of an important announcement in our professional lives that took place as of January 1, 2023. The transition was seamless and now it's time to formalize this update with all of you, our valuable clients. Please take note that Jared Thompson, Marc Willden, Steven Lamb, and Christy Hilgendorf, have separated from the VanderBloemen Group, LLC, and formed a new wealth management firm, Wealth Partners Financial, LLC, better known as "Wealth Partners." Most of you already recognize this name which was utilized before our planning and tax merger took place a few years ago.

Wealth Partners will continue to function as an independent, fee-only and/or fee-based firm that provides truly comprehensive and holistic financial planning and investment management advice and services to individuals, couples, families, and small business owners. Our mission is to help you achieve your financial goals and dreams with integrity, expertise, and personalized service.

Also be aware of the long-awaited merger between TD Ameritrade and Charles Schwab that was announced over a year ago. This will not require any action on your part. Simply put, as of September 30, 2023, the statements you receive will say Charles Schwab rather than TD Ameritrade. You'll have the same investments we currently utilize for you, the same fee structure, a little higher return on the cash portions of your portfolio, and the Wealth Partners name will be on your statements. So, rest assured, nothing changes but the custodian's name.

With these two changes, we want to assure you that our commitment to you and your financial well-being remains unchanged. We will continue to provide you with the same high-quality advice and service that you have come to expect over the years. We genuinely value your relationship and trust, and we look forward to working with you for many years to come. If you have any questions about these updates, please contact us at 262-240-1111. We would love to hear from you and answer any questions you may have.

Thank you for your continued confidence and support. We are honored to serve and work with you.

Sincerely,

Four handwritten signatures in blue ink are displayed in a row. From left to right, they appear to be "Christy", "Marc", "Steven", and "Jared".

Your Wealth Partners Team

Christy, Marc, Steven, and Jared