WELLS FARGO Advisors | Continuity Group

Dear Clients and Friends:

We believe the complexities of today's investment world requires greater access to investment resources, technology and expertise than ever before. That's why it's been our priority to assemble the right team of professionals with a special combination of investment discipline, collaborative insight, client service capabilities and a shared vision of always putting client's interests first.

It is our pleasure to announce that our team has combined with Buell Financial Group of Wells Fargo Advisors. Joining these two extraordinary practices with very similar cultures and complementary strengths, we believe, will benefit our clients. Our team name will remain Continuity Group of Wells Fargo Advisors representing our commitment to acting as a steadfast, dependable partner, continually serving you and your family for generations. Jerry Rouleau, Justin Buell and Dominic Corleto will serve as Managing Directors of the combined team.

Continuity Group is extremely proud of our intellectual capital: the knowledge, resources, and industry experience that makes us who we are. You'll continue to enjoy our wealth planning and investment management services and benefit from the strength of Wells Fargo & Company, Wells Fargo Private Bank and our extended network of specialists including tax, real estate, commercial real estate, trust and estate professionals.

We are now a seasoned team of 14 Financial Advisors. The synergies gained by coming together will help us better navigate the challenges and take advantage of the opportunities that may arise for you, our client. Please visit our website at **www.continuitygroup.com**. We hope you will join us in celebrating this milestone as it provides an exciting opportunity for all of us. We look forward to introducing you to the expanded team.

Sincerely,

*Continuity Group of Wells Fargo Advisors*

LEARN MORE ABOUT US >


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*Honored to be recognized as...*

**Barron's Top 250 Private Wealth Management Teams 2024**[1]

**Forbes Top Wealth Management Teams High Net Worth 2024**[2]

[1] 2024 Barron's Top 250 Private Wealth Management Teams: Awarded May 2024; Data Compiled by Barron's based on the time period from Jan. 2023 - Dec. 2023 (Source: Barrons.com). The Barron's Top 250 Private Wealth Management Teams are evaluated on a range of factors for the Financial Advisor and their team, who specialize in serving individuals and families. Factors included in the ratings include their previous year's size and shape, the regulatory records and credentials of their members, and the resources they have at their disposal to serve their client bases. Self-completed questionnaire was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

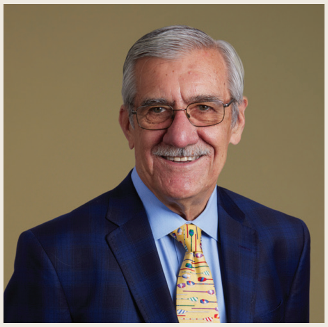
[2] 2024 Forbes Top Wealth Management Teams High Net Worth: Awarded November 2024; Data compiled by SHOOK Research LLC based on the time period from 3/31/23 - 3/31/24 (Source: Forbes.com). The Forbes Top Wealth Management Teams High Net Worth rating algorithm is based on the previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

# Meet the Leadership Team

**Gerald Rouleau, QPFC®**
Private Wealth Financial Advisor
Managing Director-Investments

**Justin Buell, CRPC®**
Private Wealth Financial Advisor
Managing Director-Investments

**Dominic Corleto, C(k)P®, CRPS®, CRPC®, AIF®**
Private Wealth Financial Advisor
Managing Director-Investments



**Richard "Scott" Smith**
Private Wealth Financial Advisor
Managing Director-Investments

**Tracy Maltby**
Senior Financial Advisor
Senior Vice President-Investment Officer

**Lucas Widoff, CFP®**
Senior Financial Advisor
Senior Vice President-Investment Officer

**Haley Thomas, CFP®**
Senior Financial Advisor
Vice President-Investment Officer

**Tyler Bevans, CRPC®**
Senior Financial Advisor
Associate VP-Investment Officer

**Frederick Sernatinger, CRPC®, CRPS®**
Financial Advisor

**Richard Driessnack, AAMS®, CRPC®**
Senior Financial Advisor
Senior Vice President-Investment Officer

**James Osborne**
Senior Financial Advisor
Managing Director-Investments

**David Aichele, CFP®, RICP®**
Financial Advisor
Vice President-Investment Officer

**Cody Calabrese, ChFC®, CEPA®**
Senior Financial Advisor
Vice President-Investment Officer

**Tom Birk**
Senior Financial Advisor
First Vice President-Investment Officer