

THE MEYDENBAUER BRIEF

SPRING 2026



Recently, our team set aside time to take part in the Black Glass Challenge at DeLille Winery. It is an educational tasting experience where wines are sampled from blacked-out glasses, removing visual cues and encouraging you to focus purely on aroma and taste to identify grape varieties. A few (well, one) of us arrived feeling quite confident, drawing on years of wine tasting experience. Twenty humbling minutes later, with only one correct guess among us (full disclosure: it was grape juice), we were reminded how easy it is to make assumptions and how valuable it can be to stay open, curious, and grounded.

That lesson feels especially relevant after the past several weeks in the stock market. When conditions are uncertain, confidence alone is not a strategy. What tends to matter most is sticking with time-tested investment planning principles, thoughtful diversification, and a long-term perspective rather than reacting to short-term noise. As a team, we intentionally seek out experiences or education that are both fun and challenging. That helps us test our thinking, continue learning, and sharpen the perspective we bring to you. Our goal is always the same: to provide steady guidance, sound judgment, and a level of service you can rely on through all types of market environments. Most importantly, we value the trust you place in us. Whether markets are calm or challenging, our role is to help you stay grounded, focused on what matters most, and confident in the plan we have built together. We are grateful to walk this journey with you and remain committed to guiding you thoughtfully through whatever comes next.

Welcome Sang Lee to Our Team

Please join us in welcoming Sang Lee, our new Senior Registered Client Service Associate at The Meydenbauer Bay Private Wealth Management Group. Sang brings experience from mortgage operations and J.P. Morgan's Private Bank, and is known for precision and responsive client service. He holds a B.S. in Economics (Northern Illinois University) and is pursuing an MBA in Finance (UIC). Recently relocated from Illinois, Sang enjoys travel, local cuisine with his wife, and time with their poodle, Teemo. We're excited to welcome Sang to the Pacific Northwest!



Celebrating Alyssa's CFP® Success

We're thrilled to announce that Alyssa has officially earned her CERTIFIED FINANCIAL PLANNER® certification! After months of focused study and dedication, Alyssa has reached a major professional milestone that enhances her expertise in comprehensive investment planning. Alyssa's accomplishment reflects her commitment to excellence and to providing thoughtful, informed guidance to clients and colleagues alike. Please join us in congratulating Alyssa on this well-deserved achievement.

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TEAM SPOTLIGHT

As our team grows and evolves, so do the people behind it. Get to know our team a little bit better each quarter. This quarter, we want to introduce you to Ryan Carpenter!



Ryan Carpenter

Registered Client Associate

What is the best piece of financial advice you have received?

"Pay yourself first. While simple, this piece of advice was invaluable to me when I started my first job. By following it, I was able to grow my savings enough from a part-time job to move two states away in search of better career opportunities – ultimately leading me to where I am today as a member of our team. That same mindset helped me purchase a new car, fund my wedding last April, and experience countless other adventures along the way. I can genuinely say my life today would look very different had I not received that advice when I was younger."

What's one trend in the financial world you are excited about or keeping your eye on?

"I am intrigued to see how markets continue to react to the rapid integration of AI into everyday life and work. At the same time, I'm keeping a close eye on the ongoing challenge of powering AI data centers, which require vast amounts of energy. It's also concerning to see how communities surrounding these centers are beginning to experience negative impacts, including early research suggesting potential spikes in cancer rates. The balance between technological innovation and real-world impact is something I'm watching closely & curious to see how it all plays out."

What is the next big trip you are taking?

"My next big trip is to Southern Italy with my wife. Her family is originally from that region, and I've always loved history, so it felt like the perfect adventure for us. We're excited to dive into the food, art, and history—and honestly, even just sitting at a café with an espresso and people-watching in a place we've never been sounds amazing."

What is a book, podcast, or show you've been loving recently?

*"As a sports fan, I often find myself listening to the Ryen Russillo and Bill Simmons podcasts during the football and basketball seasons. I recently started reading Ken Kesey's *One Flew Over the Cuckoo's Nest* because I thought it would be fun to compare the book to the 1975 film adaptation starring Jack Nicholson. In the few comparisons I've made between books and their film versions, the book usually ends up being my favorite—and I'm curious to see if that holds true again."*

What is one hobby or activity that brings you joy?

"I've always loved music—whether discovering new artists and genres or seeing my favorites in concert. A few years ago, my wife gifted me a record player, and since then I've been growing and cataloging my collection, which is now nearing 100 records. I love digging through crates at local record stores and attending record conventions where collectors of all ages come together to buy, sell, trade, and talk all things vinyl. As the child of music-loving parents, it's especially fun and meaningful when I stumble across records by artists they used to see live when they were my age."

What is one recipe that holds special meaning for you and why?

"Linguine with sausage and zucchini will always be special to me because it was one of the first meals my wife and I cooked together for a Sunday dinner when we first moved in together back in 2019. I have included the recipe for everyone below in case you want to try it for yourself!"

RYAN'S LINGUINE

A light red sauce with hot (or mild) Italian sausage and zucchini served over linguine pasta



Ingredients

- 1 lb of linguine pasta
- 4) hot italian sausages or 1 lb of ground hot italian sausage
- 2) medium zucchinis
- 2) 15 oz cans of cento tomato sauce – sauce Italiano
- Olive oil
- ¼ of a large yellow onion diced
- 2-3 large cloves of garlic minced
- 2 bay leaves
- Grated pecorino romano cheese
- Parsley, Basil, Oregano, Garlic powder, Salt & Pepper to taste

Prep

1. I prefer to cook the sausage out of the casing so I will remove the casing before I start cooking
2. Dice the onion – set aside
3. Mince the garlic – set aside
4. Cube zucchini – set aside

Directions

1. In a deep skillet, heat some olive oil on medium-high heat, about 3-5 minutes.
2. Add in onion and garlic – sauté until fragrant, about 1-2 minutes.
3. Add the sausage to the skillet. Cook on high heat until browned, then with a slotted spoon remove the cooked sausage. Set aside and drain the fat. Turn the heat back down to medium-high.
4. Add the zucchini to the skillet. Season with salt, pepper, and garlic powder and sauté for about 2 minutes. It's important not to cook the zucchini for too long at this point as it will finish cooking in the sauce.
5. Add the browned sausage back to the skillet.
6. Add both cans of tomato sauce – I like to add a little bit of water to the empty cans to ensure I get all the sauce out.
7. Add in all seasonings – Parsley, basil, oregano, garlic powder, salt, pepper, 2 bay leaves.
8. Sprinkle about 3 tablespoons of grated pecorino romano cheese into the sauce. Stir and cover. Let simmer on low heat for about 30 minutes to an hour.
9. While the sauce simmers, cook your linguine to package directions. I like to undercook the pasta by 1 minute to let it finish cooking in the sauce. Be sure to salt your water before dropping in the pasta.
10. Combine sauce and pasta in a large serving bowl, top with additional grated pecorino romano to your liking – serve & enjoy!