



Happy Thanksgiving!

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November 2023

Dear Clients and Friends,

I hope this letter finds you well. As we near Thanksgiving and start taking stock of this past year, I'm sure you're reflecting on the many achievements you've experienced. I'd also like to take this opportunity to share with you a few milestones that our team is grateful for.

We've moved to a new permanent location in North Hollywood, in the heart of the entertainment industry. It's a spacious open-concept space, ideal for meetings, collaborative work, and ample room for growth. Even though so many of our meetings now take place on Zoom, we invite you to come and visit us so you can see it for yourself!

Our team is growing! Please join me in welcoming our new Communications Manager, Christina Constable. Christina will lead our client outreach and communications, as well as foster relationships with professionals in our community.

To complement our new location and growing team, we're planning a complete refresh of our online presence, newsletters, and the development of additional resources to enhance our work on financial plans.

As I've had the pleasure of sharing with many of you, after several years of intense study, practice, and examinations, I earned the specialized Chartered Market Technician "CMT" designation. This accomplishment reflects our commitment to continue expanding and advancing the capabilities of our investment process. As we like to say, "we're analysts with a heart" and our analytical and technical capabilities are the foundation of our growth.

Among our excitement, it's important to acknowledge the broader world around us. While our professional journey has seen milestones and successes, we recognize the challenges that persist globally. In these times of volatility, we stand with those experiencing hardships and adversity. As we express our gratitude for the successes of the past year, we also recognize the need for compassion in the face of global challenges. May this Thanksgiving be a time of reflection, gratitude, and unity, as we navigate the complexities of the world together.

Wishing you and your loved ones a Thanksgiving filled with joy, gratitude, and the warmth of cherished moments.

All the Best! -
Rob

The AssetIO Wealth Management Team



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Get In Touch



Rob Proano is a financial advisor with and securities and advisory services are offered through LPL Financial, a registered investment advisor. Member FINRA/SIPC.

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