



FOR IMMEDIATE RELEASE

Ullmann Wealth Partners Names Caitlin Frederick New Partner

[Jacksonville Beach, January 8, 2024] – [Ullmann Wealth Partners](#) is proud to announce its newest partner, [Caitlin Frederick](#) – CFA, CFP®, Director of Financial Planning and Wealth Advisor.

Frederick, co-author of [Move Forward Confidently: A Woman's Guide to Navigating the High-Net-Worth Divorce](#), oversees the financial planning process for all clients at Ullmann Wealth Partners. She joins Founding Partner Glenn Ullmann CDFA®, CAP®; Managing Partner Brian James, CPWA®; Partner Patrick Kilbane, J.D., CDFA® and Partner Carrie King, IACCP® in this new role.

“We’re all thrilled to welcome Caitlin as our newest partner,” Ullmann said. “She is an accomplished individual, and her expertise, dedication, and commitment to client success serve as a major asset to our team.”

Frederick has a specific passion for working with [young professionals](#) to help them establish financial plans for decades of future success. She feels that this highly determined group of individuals are often wrongfully overlooked by other financial advisors. In 2023, she was selected as a *Rising Star Honoree* in the prestigious WealthManagement.com Industry Awards, which recognize industry professionals at Registered Investment Advisor (RIA) firms who have made significant contributions within the industry and to their respective firms.

She was also recognized as a *Rising Star* in finance by the [Jacksonville Business Journal](#).

About Ullmann Wealth Partners:

[Ullmann Wealth Partners](#) is a leading wealth management firm dedicated to helping individuals, families, and businesses achieve their financial goals. With a client-centric approach, Ullmann provides personalized solutions and guidance in investment management, retirement planning, tax strategies, and estate planning. The firm is committed to delivering exceptional service and building long-term relationships based on trust, transparency, and integrity.

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