

The background of the entire advertisement is a photograph of a landscape at sunset or sunrise. The sun is a bright, glowing orb in the center of the horizon, casting a long, warm orange and yellow light across the sky and the land. The sky is filled with soft, wispy clouds. In the foreground, there are dark, silhouetted hills and mountains. The overall mood is peaceful and serene.

WELLSPRING

BEYOND WEALTH MANAGEMENT

*Experience
Peace of Mind*

**BOUTIQUE EXPERIENCE,
CURATED RESOURCES**

**YOUR DEDICATED
ADVICE TEAM**

**IS A FAMILY OFFICE
RIGHT FOR YOU?**

GMAGWEALTH.COM

Working with

575+

UHNW Individuals,
Households,
Family Offices, and
Businesses

\$5.8B+

Assets Under
Management*

*Assets under management include assets associated with our management of clients' securities portfolios on a discretionary and nondiscretionary basis, as well as assets associated with our financial planning and consulting activities, which may include family office services, bookkeeping and bill pay services, budgeting and cash flow analysis and projections, and tax and estate planning review and advice.

The Right Size

**Boutique experience—
curated resources**

GMAG has the resources of a large firm with the custom, tailored approach your unique financial position deserves.

Aligned with Your Goals

Your dedicated Advice Team

Your team learns what is important to you and applies their experience and knowledge to help you achieve your goals.

Our Family Office Services

**Experience a New Level of
Financial Management**

We are a financial firm that understands the unique needs and aspirations of your family. At GMAG, we take pride in our Family Office Service offering, which is tailored to elevate your financial management experience.

RECOGNITION



FORBES 2022
America's Top RIA Firms



FT 300 Top
Registered
Investment
Advisors (RIAs)



FA Top 50 Fastest
Growing RIAs

FA Top Registered
Investment Advisors (RIAs)

Rankings and/or recognition by rating services and/or publications should not be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results if GMAG is engaged, or continues to be engaged, to provide investment advisory services, nor should it be construed as a current or past endorsement of GMAG by any of its clients, or a third party. Rankings published by magazines, and others, generally base their selections exclusively on information prepared and/or submitted by the recognized adviser. GMAG is a paid sponsor of the Barron's in Education Program. GMAG has paid a fee to *Forbes* and Barron's to receive expanded profile features, such as profile photo and contact information. GMAG has not paid a fee for placement on any rankings and/or recognition lists.

2022 Barron's Top 100 Financial Advisors is based upon values as of 6/30/2022. This ranking was published on 9/19/2022.

2023 Barron's Top 1200 Financial Advisors is based upon values as of 9/30/2022. This ranking was published on 3/11/2023.

2023 Forbes Best-in-State Advisors data are based upon values as of 6/30/2022. This ranking was published on 04/04/2023.

2022 Financial Advisors Top 50 Fastest Growing RIAs and Top RIAs data are based upon 12/31/2021. This ranking was published on 7/20/2022.

2022 Forbes America's Top RIA Firms data are based upon values as of 12/31/2021. This ranking was published on 10/25/2022.

“We believe responsible relationships are indispensable in exceptional client service.”



Dear Friends,

Each day presents us with a new opportunity and renewed inspiration to examine, analyze, and innovate our services, furthering our dedication to delivering an excellent client experience in accordance with our core values.

At GMAG, we understand your time is valuable. Our team consistently strives to build a service delivery platform that enables us to offer uninterrupted and dedicated focus and seamlessly meet your needs.

Our team's commitment to staying ahead of the curve in the ever-evolving wealth management and technological landscape allows us to anticipate your needs and proactively address what matters most to you.

It is important to us to be accessible to you by offering you valuable guidance and promptly addressing any concerns or inquiries you have. By leveraging our innovative technology, we have streamlined and automated processes, freeing up valuable time we dedicate to focusing on your specific needs. Through our constant drive for innovation and a focus on you, we have rolled out enhancements to our client reporting and analytics and streamlined our client onboarding and cash management processes.

Our team is fully equipped to meet your needs and provide you with information and financial advice tailored to your unique requirements. Your dedicated advice team works in synergy with our administrative and operational team leaders, who play a crucial role in ensuring the smooth operation of our technology platforms.

We believe responsible relationships are indispensable to exceptional client service. In addition to our extensive technological efforts, for the benefit of our team and clients, we prioritize the ongoing career development and training of our employees. We take immense pride in our career advancement, diversity, and inclusion initiatives and our comprehensive training programs.

Your continued confidence in us motivates us to persist in delivering our best work. Thank you for choosing and trusting us.

Gain insight into the GMAG team's behind-the-scenes activities by taking a closer look inside.

Warm Regards,

Frank P. Marzano

FRANK P. MARZANO, CFP®, CPA
MANAGING PRINCIPAL



CONTENTS

1

Letter from
Frank P. Marzano

4

Your Advice
Team

6

The GMAG
Executive Team

7

GMAG Women
of Purpose

8

Spotlight on the
GMAG Family Office

10

GMAG
In the Mix

12

Worth
Beyond Wealth

13

Collective
Intelligence

21

GMAG
Book Club

14

GMAG
Good Works

16

GMAG
Services

17

Integrated Technology
Platforms

18

GMAG
NextGen

WELLSPRING 2023

OUR PROMISE

To show up for our clients every day and always respect and appreciate their trust and confidence.

OUR CORE VALUES DRIVE OUR CULTURE

Responsible Relationships

We treat our clients the way we want to be treated. We uphold the pillars of a strong relationship: we actively listen, ask the right questions, offer trusted advice, communicate with transparency, and consistently show up personally and professionally.

Collective Intelligence

We actively promote the expansion of our knowledge, recognizing that investing in the professional growth of our team members provides value to our clients. We continually seek out new ways to build our in-house capabilities and our integrated network of professionals in service to the goal of seamlessly tailored financial planning and advice.

Service Innovation

To deliver the highest level of personalized service, we continually deepen our understanding of what works best for our clients. We strive to exceed what anyone might expect of a leading wealth management firm by investing in technology and seeking out new ways to improve the client experience.

Performance Accountability

We bring innovative thinking to our disciplined investing framework and all of our services in order to pursue the specific goals that each client defines. By prioritizing results, our approach aims to promote client confidence through unpredictable markets and support their goals of creating and preserving wealth for future generations.

YOUR ADVICE TEAM

A Small Team Specifically Assigned to You,
Aligned with Your Goals

Each of our valued clients has their own Advice Team, part of our dedication to maintaining a small-firm feel with big-firm resources. Your Advice Team truly gets to know you and your family, helping you integrate your life plan with your finances.

You determine what you want your wealth to do for you. Your Advice Team is here to ask the right questions to gain a better understanding of the future you wish to create.

Advice Teams are the next generation of our continued efforts to leverage our collective intelligence to provide the personalized service and personal touch you and your family have come to expect.



*From Left to Right:
Michael Bongiorno, Wealth Management Associate;
Rosemary Timoney, Senior Client Relationship Manager;
Frank Lavrigata, Managing Director; **Alyson Woolbright**, Wealth Management Specialist; **Elizabeth Sforza**, Client Relationship Manager*



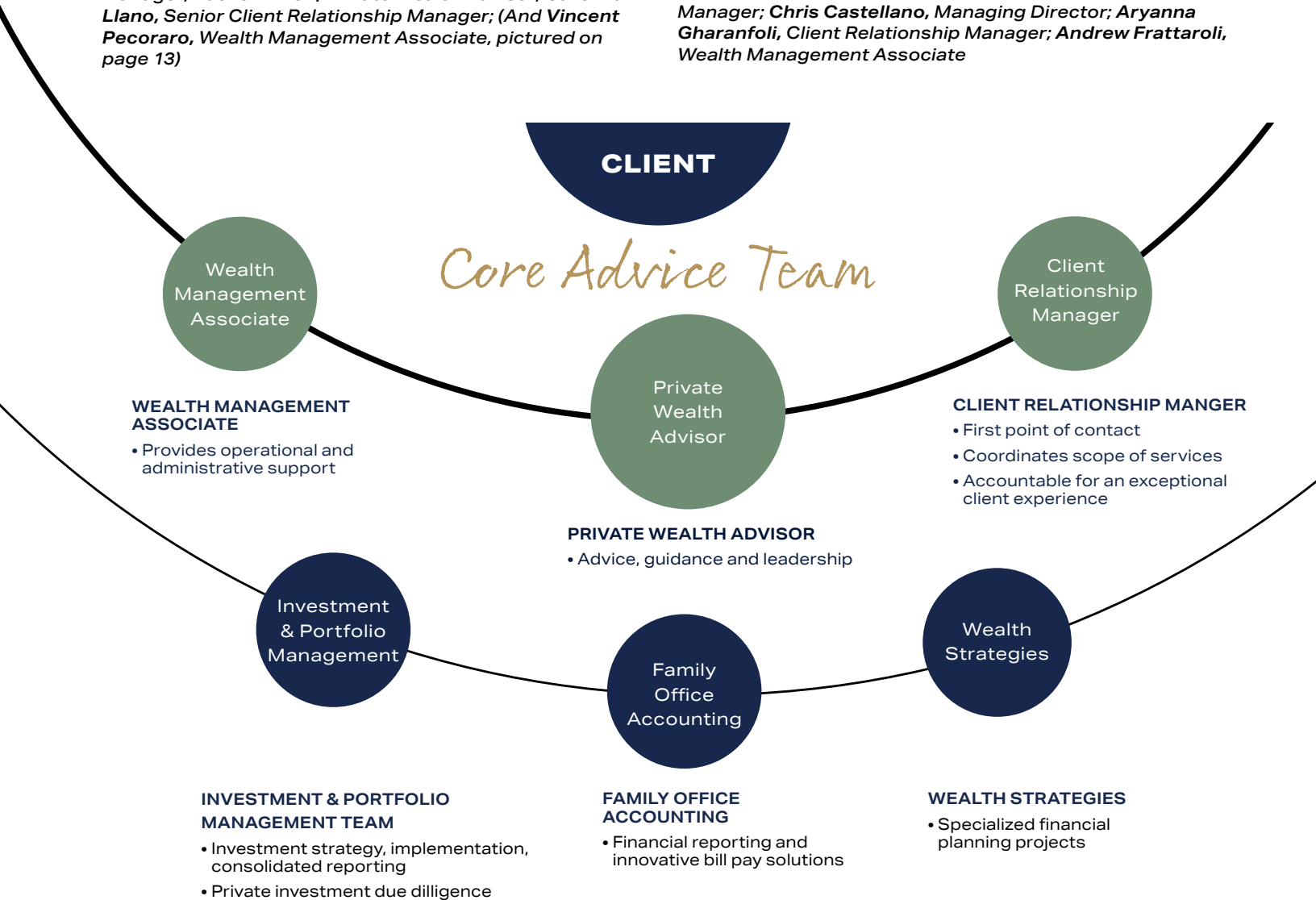
*From Left to Right:
Katerina Obermaier, Wealth Management Associate;
Taylor Stathis, Client Relationship Manager;
Charles Scarallo, Private Wealth Advisor; **Lyndsey Gorham**, Senior Client Relationship Manager*



From Left to Right: **Mariana Lombardi**, Client Relationship Manager; **Patrick Wren**, Private Wealth Advisor; **Carolina Llano**, Senior Client Relationship Manager; (And **Vincent Pecoraro**, Wealth Management Associate, pictured on page 13)



From Left to Right: **Cameryn Steiner**, Wealth Management Associate; **Danielle Paganuzzi**, Senior Client Relationship Manager; **Chris Castellano**, Managing Director; **Aryanna Gharanfoli**, Client Relationship Manager; **Andrew Frattaroli**, Wealth Management Associate



GMAG ADVICE TEAMS

Centered Around Your Needs

High-touch, engaged,
and proactive

Streamlined and
more efficient

Experienced and
Knowledgeable

Dedicated to your
unique needs and goals

THE GMAG EXECUTIVE TEAM

Founded on the Fundamentals, with One Vision



Chris Castellano, Managing Director; Patrick Wren, Private Wealth Advisor; Frank Marzano, Managing Principal; Charles Scarallo, Private Wealth Advisor; Frank Lavrigata, Managing Director; Margaret Iamunno, Chief Compliance Officer; Lyndsey Gorham, Senior Client Relationship Manager

Our executive team is responsible for leading and guiding GMAG toward its strategic goals and objectives. Their decisions shape the overall direction of the company. In their day-to-day, they ensure each department is aligned with GMAG's vision and mission.

Each member brings a wealth of knowledge and diverse perspectives, fostering a dynamic environment where ideas flourish and new possibilities emerge. Their leadership and dedication to maintaining the highest standards is evident in the work of the entire GMAG team. From fostering a culture of integrity and transparency to upholding regulatory compliance, they prioritize accountability and ethics, building trust and long-lasting partnerships with clients.

We understand exceptional service goes beyond meeting expectations; it requires anticipating client needs, offering tailored solutions, and delivering results that inspire confidence.



GMAG WOMEN OF PURPOSE

Power of the Pack

FUN FACT:
The women at
GMAG make up
63%
of our team.

We celebrate the women of GMAG and reflect on all they do for our firm and clients. These incredible women come from diverse backgrounds and bring a wealth of experience to the table. We are always inspired by their passion and commitment to delivering exceptional service to our clients.

Together, we have formed **GMAG Women of Purpose**, our initiative to gather all the amazing women in our network to share inspiration and host feel-good events. We believe true wealth comes from a state of personal well-being. For this reason, we find ways to support personal growth to help women achieve all their goals in life.

Spotlight on

THE GMAG FAMILY OFFICE

Serving Families Beyond Investments

Is a family office right for you?

GMAG's Family Office services are designed to help your family build a lasting legacy, including preparing the next generation to succeed. GMAG Family Office Services are comprehensive, including estate planning, financial planning, tax planning, insurance, bill pay, charitable planning, and other services that give you full oversight of your family office and provide detailed reporting and guidance to help you navigate through your financial life.

At GMAG, we take pride in offering Family Office Services tailored to elevate your financial management experience.

We believe family wealth should be managed with utmost care, precision, and a deep understanding of your family's dynamics, values, and aspirations.

Here's how the GMAG Family Office Services differentiate us from the rest.

COMPREHENSIVE WEALTH MANAGEMENT:

Your GMAG team focuses on not only investments, but also tax planning, estate planning, philanthropy, and intergenerational wealth transfer. We work closely with you to create a customized road map that aligns with your family's long-term objectives.

PERSONALIZED SERVICES: Whether you require assistance with investment management, risk assessment, family governance, or administrative support, our dedicated team is here to provide you with tailored solutions that suit your family's financial requirements and beyond.

MULTIGENERATIONAL SUPPORT: It is crucial to prepare the next generation for financial success. We offer specialized educational programs, mentorship opportunities, and guidance to empower your family members in making informed financial decisions and maintaining a strong family legacy.

ACCESS TO TRUSTED NETWORKS: Our network of professionals, including legal advisors, tax specialists, and investment managers, allows us to provide you with select resources and opportunities that are right for you.

THE FAMILY OFFICE ACCOUNTING TEAM



Jared Wolfe, Family Office Accountant; **JD Kirby**, Family Office Accountant; **Matthew Yakstis, CPA**, Director of Finance ; **Josh Goldsmith, CPA**, Director of Family Office Accounting; **Chris Castellano, CFP®, CPA**, Managing Director; **Sneh Shah, CPA** Family Office Accountant; **Alice Vecchione, CPA**, Family Office Accounting Manager

IN THIS ISSUE, WE HIGHLIGHT OUR
Family Office Accounting team **AND THE VALUE THEY PROVIDE.**

BILL PAY

- Simplify, digitize, and automate
- Provide transparent vendor management
- Provide controlled, efficient transaction processing

REPORTING

- Provide financial statements
- Cash flow evaluation and analysis
- Monitor credit card activity
- Track charitable contributions and advise on tax-savings options

BUDGETING

- Develop a comprehensive, attainable budget
- Budget vs. actual detail
- Analyze trends to educate clients on spending habits

LIAISON WITH OUTSIDE PROFESSIONALS

- Orchestrate timely payments of taxes, provide financial reporting, and summarize taxable deductions
- Develop optimal entity structure for estate and business needs

HOUSEHOLD PAYROLL

- Set up payroll and process it accordingly
- Prepare and file W-2s and 1099s for household employees
- Ensure compliance with all federal and state mandates

This information is for informational purposes only and does not constitute a complete description of our investment services. GM Advisory Group does not provide tax, legal, or accounting advice. You should consult your own tax, legal, and accounting advisors before engaging in any transaction.

GMAG IN THE MIX

At the table with the brightest minds



BNY MELLON | PERSHING INSITE 2023

Chris Castellano, CPA, CFP®, Managing Director, was invited to speak at BNY Mellon's Pershing INSITE 23 in Orlando, Florida. In the panel titled, "*Growing Your Business with Intergenerational Planning*", Chris discussed the best practices of intergenerational family wealth planning through financial planning, including tax and estate planning.

Chris Castellano, CFP®, CPA, Managing Director;
Aryanna Gharanfoli, Client Relationship Manager;
Andrew Frattaroli, Wealth Management



BARRON'S ADVISOR INDEPENDENT SUMMIT

Chris Castellano CFP®, CPA, Managing Director, and **Andrew Frattaroli**, Wealth Management Associate, join Barron's Advisor Independent Summit in Dallas, Texas. Here, ranked advisors connect to discuss best practices and industry trends.



SALT CONFERENCE

Frank Balas, CFA, Director of Investment Strategy, and the GMAG Investment Team attended the SALT New York Conference, joining like-minded investment professionals in a global thought leadership and networking forum that encompassed finance, technology, and geopolitics.



BARRON'S ADVISOR TEAMS SUMMIT

Alyson Woolbright, Wealth Management Specialist, and **Katarina Obermaier**, Wealth Management Associate, joined the Barron's Advisor Teams Summit in Las Vegas. We understand each team member contributes to helping our clients achieve success. The summit sessions help develop ideas on how advisors can raise the bar for services and improve the client experience.

WORTH MEDIA

Worth Beyond Wealth

GMAG has an affinity toward knowledge sharing in the areas of business, finance, and lifestyle. Our team participated in a number of events hosted by Worth Media that hit the spot.



WOMEN OF WORTH

The women at GMAG joined the conversation at the Women of Worth Summit hosted by *Worth* magazine.

The annual Women of Worth Summit gathers entrepreneurs, investors, and government officials for a day packed with conversations to empower, educate, and inspire women to amplify their worth.



WORTH HEALTH & WELLNESS ISSUE RELEASE

The GMAG Team celebrates with *Worth* magazine's release of the 2023 Health and Wellness issue. GMAG values wellness and appreciated taking in *Worth's* tips on how to achieve wellness through the investment of time, energy, and money.



WORTH CITIES—CHARLESTON

The GMAG team participated in the Worth Cities Summit 2023 in Charleston, South Carolina, in June.

GMAG joined thought leaders, philanthropists, entrepreneurs, and policymakers who play a huge role in developing thriving communities and nurturing rising cities.

GMAG participated in many conferences such as:

Pershing Elite Advisors
CNBC Financial Advisor
Summit

Barron's Independent
Summit

Barron's Teams Summit
BNY Mellon's Pershing
INSITE

Sage Transform

COLLECTIVE INTELLIGENCE

We actively promote the expansion of our knowledge, recognizing that investing in the professional growth of our team members provides value. We continually seek out new ways to build our in-house capabilities to better serve our clients.

Promoting Within



Ryan McKinney
HR Associate



Alyson Woolbright
Wealth Management Specialist



Vincent Pecoraro
From Intern to Wealth Management Associate

Based on **Ryan's** dedication and professional growth in her administrative role, she has been able to expand her responsibilities to include recruitment, employee relations, and HR administration.

Alyson's demonstrated potential in her role on the advice team has led to her taking on additional responsibilities and a new title.

Vincent joined GMAG in May 2023 as a Wealth Management Associate on the PW team. Vincent has been working at GMAG in a full-time capacity since January 2023, fulfilling his MBA co-op requirement from Hofstra University, where he graduated this May.

Certifications



Sneha Shah, CPA
Family Office Accountant



Lauren Onsrud,
SHRM-CP
Director of Human Resources and Administration



Olivia Cacciatore,
IACCP®
Compliance Analyst

CPA is a respected accounting credential demonstrating expertise in accounting principles, financial reporting, taxation, and auditing, enabling the handling of complex financial matters and trusted advisory services.

SHRM-CP is a prestigious HR certification validating expertise in HR principles and practices and the ability to navigate professional complexities.

IACCP® is a designation for compliance professionals showcasing knowledge of investment advisory regulations, trading, and current priorities.

GMAG GOOD WORKS

Our Ongoing Commitment to Community



THE AMERICAN EXPRESS PGA GOLF TOURNAMENT

The GMAG team was back at The American Express PGA Golf Tournament in Palm Springs—an incredible event featuring the world’s best golfers. This tournament has generated millions of dollars for nonprofit organizations dedicated to supporting Coachella Valley residents since 1960.

Our Managing Principal, Frank Marzano, is the Chairman of the Impact Through Golf Foundation, a charity that strives to provide funding to organizations that support health and wellness, youth sports, families, education, and homelessness. In partnership with AMEX, they work together to host The American Express golf tournament.

This year, GMAG also made a donation to be the title sponsor of the Patriots Outpost—which provided tickets and a reserved area for Veterans, First Responders and Active Military to watch the tournament.



COPE

Each year, Frank Lavrigata, Managing Director, and Charles Scarallo, Private Wealth Advisor, join the COPE Annual Golf Outing.

COPE is a nonprofit grief and healing organization helping families who experience loss. COPE connects grieving families by providing help and support to find strength and gain tools that incorporate healthy coping mechanisms into their bereavement process.

SMILE FARMS

GMAG continues to support Smile Farms, helping developmentally disabled adults find meaningful work on farms.

Persons with a disability
are more than
3x less likely
to be employed than those
without a disability.



MARCUM WORK CHALLENGE

Each year the GMAG team participates in the 3.5 mile run/walk held at Jones Beach State Park. The annual event is a summer highlight for the Long Island business community and raises funds for local charity organizations.



GMAG donates to dozens of nonprofit organizations that make a real impact in our community. Here are a few worthy causes we've supported.

- Northwell Health-Huntington Hospital
- Boca Raton Regional Hospital Foundation
- Radical Hope Foundation
- Smile Farms
- Impact Through Golf
- Cooley's Anemia
- SYJCC
- Marcum Work Challenge
- Valerie Fund
- COPE
- Oasis
- Rotacare
- Cristo Rey
- Lend A Hand
- Project Toy
- StreetSquash

Our team, often together with our clients, identifies causes we are passionate about and chooses to support nonprofit organizations that make real, tangible differences in the world.












If there is a charity close to your heart, please share it with your GMAG Client Relationship Manager.

GMAG SERVICES

FOR EVERY CIRCUMSTANCE

Recognizing that no two members of your family are the same, we work with you to develop custom solutions that support your unique needs, goals, preferences, and circumstances.

GMAG Core Service Offerings


- | | |
|---|---|
|  Financial Planning |  Banking & Credit Facilities |
|  Asset Management |  Charitable Planning |
|  Tax Planning |  Cash Flow Management
& Bookkeeping |
|  Insurance & Risk Management |  Concierge Services |
|  Generational & Estate Planning |  Differentiated Access to
Alternative Investments |
|  Family Governance &
Education | |

*“Service is not doing what’s required of us.
Service is doing more than what’s required of us.”*

—Simon Sinek

GMAG Custom Consulting Offerings

These service offerings are outside the GMAG Core Service Offering.

- | | |
|---|---|
|  Proprietary Deal Sourcing |  Project-Based Planning & Consultation |
|  GMAG Risk Management LLC |  Corporate Accounting |

**Any fees associated with Custom Consulting Offerings will be clearly disclosed to you within separate agreements. If interested in learning more about Custom Consulting Services, please reach out to your Client Relationship Manager.*

INTEGRATED TECHNOLOGY PLATFORMS

DEDICATED TO SERVICE EXCELLENCE



GMAG TECH COMMITTEE: *Jared Wolfe, Family Office Accountant; Angela Loffredo, Operations Manager; Chris Castellano, CFP® CPA, Managing Director; Margaret Iamunno, Chief Compliance Officer; Shania Ishridas, Performance Reporting Analyst; Natalie Sequeira, Salesforce Administrator; (ON SCREEN) Olivia Cacciatore, Compliance Analyst; Michael Bueti, Portfolio Manager*

Our dedication to serving our clients at the highest level extends to our integrated technology platforms. GMAG prioritizes our technology investments and we choose our solutions with deliberation. Our technology, however, is nothing without our committed team members.

The GMAG Tech Committee works with our portfolio, investment, and other internal and external experts, synchronizing key information across the organization. Together, we leverage our collective intelligence to pull precise data to better analyze client and business data for optimal knowledge sharing and decision making.

The Tech Committee's goal is to provide our clients with a seamless experience by delivering efficient services, insightful reporting, advanced analytics, and empowering insights that enable them to make well-informed decisions.

NEW DEVELOPMENTS:

NEW STANDARDIZED REPORTING:

The Technology Committee has enhanced the efficiency of data processing and reporting generation, and redesigned the layout and format of reports for improved comprehension.

CLEAN DATA: Our two main data hubs, Addepar and Salesforce, have new additional processes to provide clean data and reporting accuracy.

INTEGRATION: The Technology Committee is dedicated to integrating our widely utilized platforms to improve communication by enabling seamless data exchange between our different systems.

STANDARD PROCESSES + AUTOMATION:

There are new standard processes and automation in development for the client experience, from prospecting stages to client stages in terms of onboarding, billing, and daily operations.



The GMAG NextGen's mission is to provide independent, engaging, and relevant resources that will better prepare the next generation of our clients, friends, and families for financial success.

GMAG + BARRON'S HOST A WEBINAR FOR THE STUDENTS AT THE COLLEGE OF CHARLESTON

SHARPENING YOUR COMPETITIVE EDGE—Navigating Resume Building and Interview Skills in Today's Job Market

With increasing college graduation rates and fierce competition for employment, it's crucial to have top-notch resume and interviewing skills. Our GMAG NextGen team is helping the next generation improve their odds of landing high-quality jobs throughout their careers.

This webinar was geared toward NextGeners newly entering or in the workforce.

- Distinguish yourself through your personal brand and social media
- Resume must-haves and dos & don'ts
- Developing essential interviewing etiquette
- Prepare for common interviewing questions
- Tips on how to follow up after an interview and introduction, a crucial step to stand out from the rest



Andrew Frattaroli, Wealth Management Associate;
Aryanna Gharanfoli, Client Relationship Manager;
Cameryn Steiner, CPA, Wealth Management Associate

GMAG'S NEXTGEN COMMITTEE understands that in today's job market, it is more important than ever to have strong resume and interviewing skills. College graduation rates are increasing, and so is competition for employment. A mediocre interview or first impression can cost you an important opportunity.

*Have questions about our NextGen program?
Reach out to your Client Relationship Manager
for more details.*

“Inclusion and well-being are the cornerstones of a thriving workplace. When employees advocate for an inclusive and healthy environment, they pave the way for success, fostering a culture where diversity is celebrated, and every individual can flourish.”

—Lauren Onsrud, Director of Human Resources and Administration

GMAG DEI COMMITTEE

DIVERSITY, EQUITY, & INCLUSION

We are committed to promoting diversity and inclusion in all aspects of our business, including recruitment, retention, development, and advancement. We believe a diverse and inclusive environment is essential for driving innovation, creativity, and business success.

We work to create a culture of belonging that honors and celebrates the unique experiences, perspectives, and backgrounds of all employees and strive to create a workplace free from discrimination and bias. By embracing diversity and inclusion, we can create a better workplace for everyone.



Lauren Onsrud, Director of Human Resources and Administration; **Sneh Shah, CPA**, Family Office Accountant; **Ryan McKinney**, HR Associate; **Shania Ishridas**, Performance Reporting Analyst; **Natalie Sequeira**, Salesforce Administrator; **Josh Goldsmith, CPA**, Director of Family Office Accounting ; **Katarina Obermaier**, Wealth Management Associate (ON SCREEN)



GMAG team members participate in a group fitness class.

GMAG WELLNESS

AND PERSONAL DEVELOPMENT INITIATIVE

GMAG sponsors periodic team events and wellness activities to foster an uplifting environment of care and team camaraderie in the workplace. A holistic approach to team development ensures we show up for our clients as our best selves.



WELLSPRING

GMAG's *WellSpring* —

Keeping You in the Know

WellSpring is our client-oriented digital news source, where we curate the latest in GMAG thought leadership, events, and updates contributed by our team of professionals and other innovative thinkers.

WELLSPRING MAGAZINE

Our *WellSpring* magazine is published to keep our clients in the know about everything happening at GMAG.

INVESTMENT PERSPECTIVES

Investment opportunities are constantly evolving alongside changing economic conditions. As a result, we believe it is important to regularly communicate our perspective on the prevailing market environment and how we approach positioning your investment portfolio based on our outlook.

WELLSPRING COMMUNICATIONS

GMAG's hand-curated lineup of quality content, which is emailed to you, is designed to keep you abreast of the latest news and ideas on the topics that matter.

WEALTH STRATEGIES

We provide our clients with up-to-date information and support around wealth planning strategies, such as estate planning and taxation, asset protection, insurance, philanthropy, and retirement benefits, and we encourage the important conversations that help people work through potential solutions together.

Follow our updates on proposed tax law changes,
including how your situation may be affected.

wellspring.gmagwealth.com

GMAG BOOK CLUB

What We're Reading

the
GMAG
BOOK
CLUB

The Greatness Mindset Unlock the Power of Your Mind and Live Your Best Life Today Lewis Howes

New York Times
Bestselling Author

THE GREATNESS MINDSET

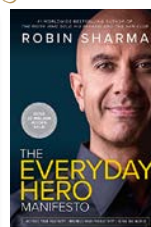
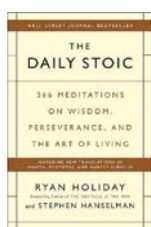
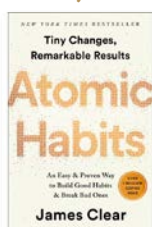
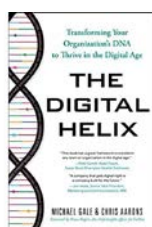
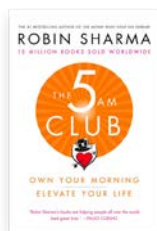
by Lewis Howes

Are you living your most authentic life? Are you leaning into your purpose or running away from it? Is this the story you want your future self to tell, or do you ache for something more?

Through his breakthrough discoveries, *New York Times* best-selling author Lewis Howes reveals how you can rewrite your past to propel yourself into a powerful and abundant future.

By applying the lessons and strategies found inside *the Greatness Mindset*, you will be able to design the life of your dreams and turn it into reality.

Previously Recommended Reading



SCHOOL OF GREATNESS

with Lewis Howes

Episodes range from interviews with incredible world-class game changers in entrepreneurship, health, mindset, and relationships, to solo rounds with the host, Lewis Howes (me!), and the one-a-week listeners' favorite, the 5-Minute Friday format. I also have unique interviews like this with YouTube celebrities.

We cover topics like fitness, money, nutrition, spirituality, entrepreneurship, mental health, and human rights.

GMAG OFFICES

Come Spend Time with Us



400 BROADHOLLOW ROAD
SUITE 301
MELVILLE, NY 11747



477 MADISON AVENUE
22ND FLOOR
NEW YORK, NY 10022



150 EAST PALMETTO PARK ROAD
SUITE 500
BOCA RATON, FL 33432



Thank you
for your trust and confidence.
We never take it for granted.

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The information contained herein is provided for informational purposes only and does not constitute a complete description of our advisory or investment services or performance.

The recommendations developed by GMAG in connection with its services are based upon the professional judgment of GMAG and GMAG cannot and does not guarantee the results of any recommendations.

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