



Welcome Edward T. Maraccini To Next Generation Wealth Management

Edward T. Maraccini, CFA® Senior Portfolio Manager



On behalf of the **Next Generation Wealth Management** team, I am pleased to announce **Edward T. Maraccini** has joined the firm to proactively serve our growing client base and evolving investment needs. Ed's strong analytical background will allow us to expand our already deep investment platform, enhance our financial & retirement planning capabilities, and allow us to deliver a superior client experience with the personal relationship that you are accustomed to.

Highly qualified and well respected across the industry, Ed's expertise was developed during his long-standing, 20-year career as a Portfolio Manager at Manulife Asset Management (previously known as Optique Capital Management and Johnson Asset Management) managing over \$1.7 billion dollars for institutional and individual clients.

As **Senior Portfolio Manager**, he will be responsible for uncovering new investment opportunities, building customized investment portfolios, and providing in-depth research on a variety of topics specific to meeting the objectives of our clients ... all while maintaining a focus on actively reducing costs and taxes, where possible.

Ed holds a Bachelor of Science (BS) degree in Accounting and Finance from the University of Wisconsin-La Crosse and is a Chartered Financial Analyst (CFA®). In addition, he is a member of the Milwaukee CFA® Society and also serves on the Board of Directors and the Finance Committee for the Kenosha Public Museum Foundation.



Outside of his passion for the financial markets, Ed enjoys family activities especially camping, mountain biking, golfing, and walking his dogs. In addition, he likes to participate in local triathlons with friends, and has recently added bikepacking to his bucket list.

We at Next Generation Wealth Management are excited about our team's growth and the addition of Edward Maraccini. As always, I can be reached directly at (414) 257-4248 to answer any questions you might have.

Thank you for your continued support,

David A. Massart
President

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