DAVIDSON
WEALTH MANAGEMENT
of Wells Fargo Advisors

Dear Clients and Friends,

To begin, we hope this letter finds you and yours well. It has been a challenging few years and a particularly difficult start for the markets in the first half of 2022. We believe now is a good time to check-in as a reminder that we are here to serve you through both good and bad times. We are here to serve you when the financial markets thrive and when they struggle. We are here to serve you during your life's transitions, celebrations, and milestones and through your life's challenges and hardships.

Some of life's experiences are realized through thoughtful, deliberate planning. Other experiences seem to come unexpectedly and force us to re-direct our energy to what is truly important in the moment. Life will always give us our share of surprises since change happens whether planned or unplanned.

At Davidson Wealth Management of Wells Fargo Advisors, we prefer to do as much planning as possible – even for ourselves. From the time I joined the team in 2005, we have been deliberately working through various transitions within our practice. We do not talk very often about our team or what we accomplish "backstage" but we felt it was an opportune time to share a few developments that will support our commitment to serving you and your family for generations to come.

- Our team is physically back in the office more regularly.
- We are pleased to be seeing more of you in-person.
- We have an established Leadership Team.
    - This team is responsible for the vision and culture of our practice.
    - We have adopted the Entrepreneurial Operating System (EOS) as a methodology to efficiently and effectively streamline decision-making.
- Chris Davis continues to be a Managing Director of Investments at Davidson Wealth Management of Wells Fargo Advisors
    - As Ambassador of our team, he relinquishes some day-to-day operations but continues to work closely with the Investment Management Team and also to mentor new associates. He continues to serve you, our clients. Writing newsletters and hosting our monthly conference calls are other ways you will see Chris in action. He claims he will "expire" before he "retires."

130 Harbour Place Drive, Suite 200 • Davidson, NC 28036
Tel 704 655-7696 • Toll Free 866 996-7696 • Fax 704 655-9352
www.davidsonwealthmgt.com

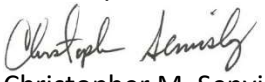
- Our Leadership Team attended a Barron's Best Team's Conference in April 2022.
    - This was our first in-person conference since before COVID.
    - It was a collaborative experience with an opportunity to exchange best practices with industry peers to further enhance your experience with us.
- The Davidson Wealth Management Care Team ensures we continue to support our community through service projects and sponsorships. A few of the organizations with which we are involved are:
    - Make an Impact Foundation
    - Ada Jenkins
    - Hospice
- Our team lives our core values as we serve you, each other, and our community. We strive to:
    - Listen Passionately
    - Execute with Excellence
    - Overcome Obstacles
    - Value Faith and Family
    - Obsess Over Clients and Associates
- We will upgrade our planning software from Envision® to eMoney.
    - This will take place over the next 12 months.
- eMoney is a more comprehensive and user-friendly planning tool.

Below is a summary of our team including both industry and Wells Fargo Advisors tenure, as well as each associate's primary role. Though a few folks are new to Davidson Wealth Management, in some cases their experience spans decades.

Davidson Wealth Management								
	Experience			Experience			Experience	
Wealth Management	Industry	WFA	**Investment Management**	Industry	WFA	**Client Fullfilment**	Industry	WFA
Christopher Senvisky	29	27	Christopher Davis	41	41	Nicholas Androvich	23	12
Tod Wells	30	21	Michael Davis	18	16	Lisa Scriba	25	25
Harriet White	36	31	Steven Giguere	36	12	Cherie Almaraz	36	32
Karen Kight	35	27	Alex Cohen	1	1	Paola Angeles	11	4
Sherry Beamer	22	16				Susan Cohen	4	2
Brent Hann	13	1						
			Total Industry Experience	**360**				
			Total Years with WFA	**268**				

With over 360 years of industry experience including 268 years with Wells Fargo Advisors, our team of highly skilled wealth management professionals is here for you. If you would like to meet with any of us, please let us know so that we can schedule a personal visit.

Sincerely,



Christopher M. Senvisky, CFP®, RICP®
Managing Director – Investments