

## RAYMOND JAMES®

# Firm Annual Report

January 2024 -December 2024

#### **Annual Client Letter**

#### Dear Brandt Wealth Management Clients,

The US stock market generally did well for 2024 and most analysts look for the good times to continue in 2025, albeit with more volatility and uncertainty. 2025 will mark my 35th year in the business and I don't believe during that time we were ever "certain" about what the market would do the following year. 2025 brings the return of the Trump Administration which campaigned on lower taxes and less regulations which are pro market but also on tariffs and deportations which are potential market headwinds.

A company called Nvidia gained fame and fortune this past year. Crypto took off and the year brought us the Magnificent 7, a group of seven stocks that accounted for over 35% of the S&P's rise in 2024. The Federal Reserve has been cutting Interest rates yet mortgage rates have climbed somewhat in the year.

Personally, my wife and I finally fully realized what many of you told us, that is, how wonderful it is to become a grandparent, as Melanee and Nate gave us a grandson in Kylen in July. It has been amazing to watch him grow and develop his personality and brings us pride to see Melanee and Nate grow in their role as his parents. Our older son Ryan and his partner Chris moved to Chicago.

I ticked off a couple of items on my personal bucket list by traveling to Hawaii with my wife Karen and enjoying it's beauty and the Aloha spirit. Then in December I ticked off another one by riding in the Santa Rampage with over 2,000 other Christmas themed Santa's and the like in a joyous bike ride. Karen and I also travelled to Cleveland this past September and took in a concert there featuring Rod Stewart and Billy Joel. I can still picture my wife Karen smiling and singing along that night with Rod and the Piano Man, as she looked as remarkable to me that day as she did some 41 years ago when we got married.

At Brandt Wealth Management we moved the Pig Roast from late August to mid-September and saw approximately 300 of you partake in some great food and music that day. The Christmas Parade event, an event spearheaded by Laura and Vicki continues to get bigger and better every year. Our Golf outing at Hawks View and the Packer Party at the Plaza rounded out a fantastic year of client events.

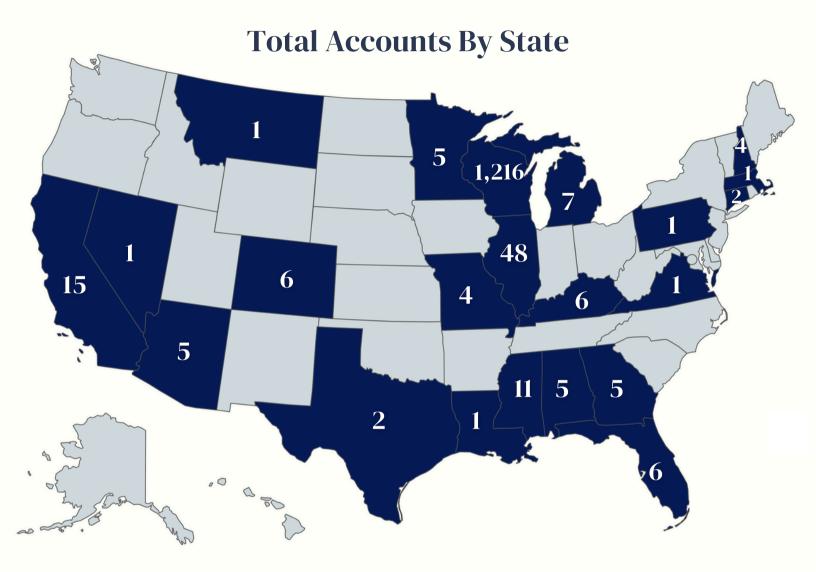
As I close this letter out I am filled with joy and hope. Joy for you and the relationships we have developed these years and cannot fully express what you have meant to me and my family. And filled with hope that 2025 will bring you health and memorable milestones in your journey through life.

As always, we are honored and humbled by the opportunity you have given us to serve you and your families as your financial advisor. We will continue to work to make our little corner of the world a better place.

Your Trusted Advisor, Clay W. Brandt Senior Vice President, Investments CERTIFIED FINACIAL PLANNER™

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## **On The Map**



Thanks to our growing online presence, clients moving across the country, and your referrals of family and friends we have clients in 22 states!

### **2024 By The Numbers**

6	507	12
Clients	Client	New Client
Retired	Households	Households
237 Million	24 - CFP®, 8 AIF® + 40 Webinars Watched	2
Client Assets	Hours of Continuing	Conferences
Mangaged	Education	Attended

Net New Assets - \$5,000,000

#### **Client Segmentation**

Age Range	Relationships	Age Range	Relationships
75+	111	55-59	52
70-74	61	45-54	58
65-69	57	<45	66
60-64	75	Other	10

#### 2024 Year in Review

January 31, 2024 - Clay named to 2024 Five Star Wealth Manager by Milwaukee Magazine

April 3, 2024 – Clay's 1 year of getting over prostate cancer.

April 11, 2024 - Clay and Karen head to Hawaii for a anticipated dream vacation of seeing Hawaii.

April 17, 2024 – Clay completes his 18th year as a Burlington Park Board Member.

May 4th, 2024 - Clay joins other Raymond James advisors in the Cayman Islands for a top advisor trip.

May 6, 2024 – Vicki Spinler's 5th anniversary of being at Brandt Wealth Management.

May 13, 2024 - Nate's 6th year of being an Accredited Investment Fiduciary (AIF®).

**May 15, 2024 –** Clay and his wife Karen 4th year with their rescue dog Sadie from Lakeland Animal Shelter in Elkhorn, Wisconsin (see page 10 for photos).

**May 25, 2024 –** Clay and Nate's 6th anniversary of being with Raymond James after coming over from Wells Fargo Advisors.

June 3, 2024 – Nate and Melanee's first Wedding Anniversary.

**July 15, 2024**- Nate and Melanee welcome firstborn Kylen William Brandt into the world weighing 7 lbs 3.1 oz (see page 9 for photos).

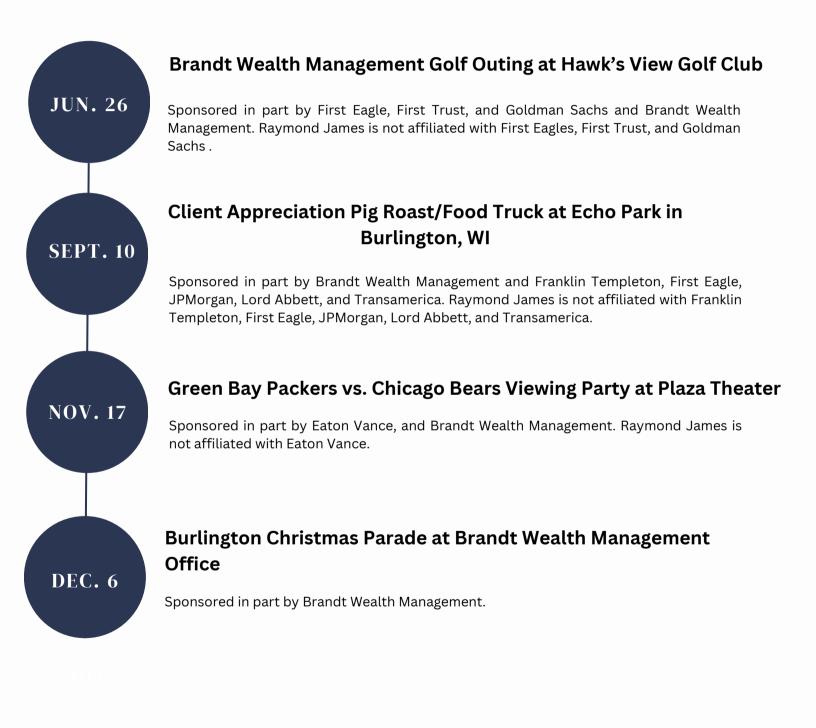
August 1, 2024 - Clay's son Ryan and Chris sell their home in Arizona and move to Chicago, Illinois.

**September 17, 2024** - Clay & Karen celebrate their anniversary by seeing Billy Joel & Rod Stewart in concert in Cleveland, Ohio.

November 4, 2024 - Nate and Melanee sell their home in Illinois and move to Lake Geneva.

December 7, 2024 - Clay rides in the Santa Rampage Bicycle Riot in Milwaukee.

#### **Brandt Wealth Management 2024 Client Events**



#### Look forward to more events coming in 2025!





























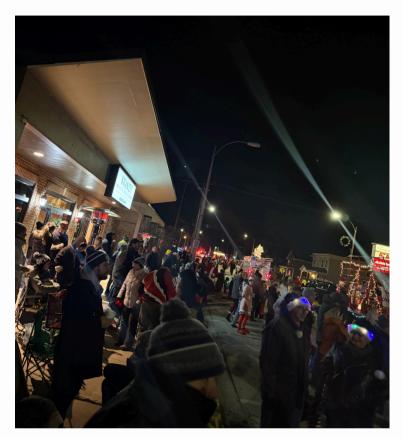


















Thank you for being part of our journey this year. We look forward to continuing our partnership in 2025.

Brandt Wealth Management does not exist without our invaluable clients and incredible team members, nor the vast community of supporters and collaborators who come together to infuse the company with its authenticity and uniqueness. There is simply no Brandt Wealth Management without you.

To each of you, we say thank you for your kindness, curiosity, critiques, and connection. We hope to always honor our investment in us.



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