ATLAS INVESTMENT MANAGEMENT of NEST CAPITAL

NEWSLETTER

Spring 2025

New Presidential Administration, Your Same Dedicated Financial Team

Every presidential transition and new administration brings new economic policies. As investors face new leadership in Washington, we begin navigating the election's tax and investment planning implications.

Rest assured, our team remains dedicated to helping you develop investment strategies that track your goals amidst political and economic policy shifts. If you have questions about your investment strategies, please call our office to schedule a time to speak with your advisor.

IN THE ISSUE

Investor Conference Calls: State of the Markets Monthly Roundtable

Atlas Investment Management of NEST Capital News & Updates

Visit our website's resources tab to access helpful tax documents:

Planning for your 2024 taxes- document mailing schedule

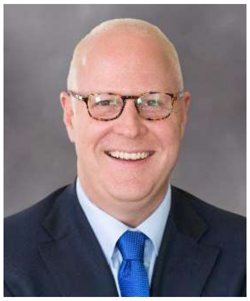
2025 Annual Limits Relating to Investment Planning

Greensboro: 743-230-2232 Wilmington: 910-834-6301 atlasinvestmentmanagement.com

WELLS FARGO
Investment Institute

State of the Markets Monthly Roundtable

Investor Conference Calls



Please join Darrell Cronk, Chief Investment Officer for Wealth and Investment Management, as he hosts a roundtable discussion with senior strategists.

Strategists will cover our latest outlook for the economic recovery; timely equity and fixed income guidance for this stage of the economic cycle, and practical ideas for balancing risk and reward in portfolios.

As always, Darrell and the team will build their discussion around your questions (email WFII@wellsfargo.com).

Investment professionals and their clients are welcome to join Wells Fargo Investment Institute (WFII) every second Wednesday of each month in 2025:

Jan. 8 | Feb. 12 | Mar. 12 | Apr. 9 | May 14 | June 11 | July 9 | Aug. 13 | Sept. 10 | Oct. 8 | Nov. 12 | Dec. 10

4:15 p.m. Eastern
3:15 p.m. Central
2:15 p.m. Mountain
1:15 p.m. Pacific

Dial-in: 877-601-6604
Passcode: 71-306-44

Email questions for the panel to WFII@wellsfargo.com

A replay will be made available after compliance review.

Business Texting

We are pleased to let you know that business texting is now available as another way for us to connect when on the go. Thanks to new technology through Wells Fargo Advisors Financial Network, with your consent, we will be able to exchange business text messages. The types of business text messages you could receive might include appointment confirmations or reminders.

We are committed to communicating with you based on your preferences which is why, when you receive the first business text, you can either reply **"yes"** to enable texting capability or you can reply **"stop"** if you do not want to communicate with me through text messaging.

It is important to note that if you do approve texting, **you should not include any orders or requests for financial transactions in your text messages**. Atlas Investment Mnagement of NEST Capital cannot accept these instructions via text messages and does not accept responsibility for their execution.

Contact Us to Enroll

Contact us through email to enroll in Business Texting with Atlas Investment Management. **info@atlasinvestmentmanagement.com**

New Texting Phone Numbers

Jason Harris, Partner, Senior Financial Advisor	**910.713.1897**
Christopher "Rusty" Knowles, Partner, Senior Financial Advisor	**910.679.9339**
Adam Bolick, Partner, Senior Financial Advisor	**910.807.4590**
Zach Edwards, Partner, Senior Financial Advisor	**336.962.2146**
Marcy Bolick, Senior Registered Business Development Manager	**910.519.8960**
Troy Sharpe, Registered Operations Manager	**910.239.0823**

Please note that Business Texting is for client use only.
Prospective clients should call 910-834-6301.

2025 Holiday Office Closures

Monday, February 17 Presidents Day

Friday, April 18 Good Friday

Monday, May 26 Memorial Day

Thursday, June 19 Juneteenth

Thursday, July 3 Early close 2:00 pm

Friday, July 4 Independence Day

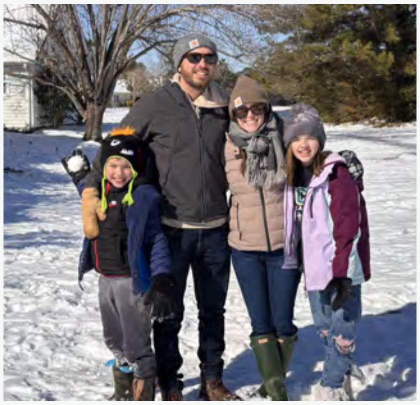
Monday, September 1 Labor Day

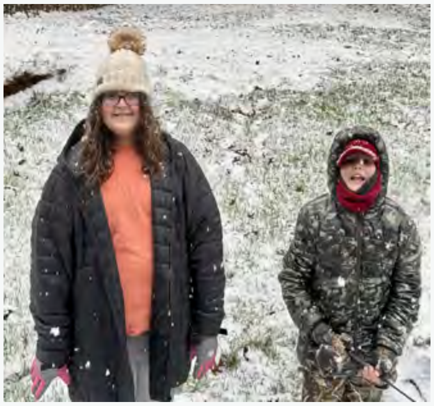
Thursday, November 27 Thanksgiving

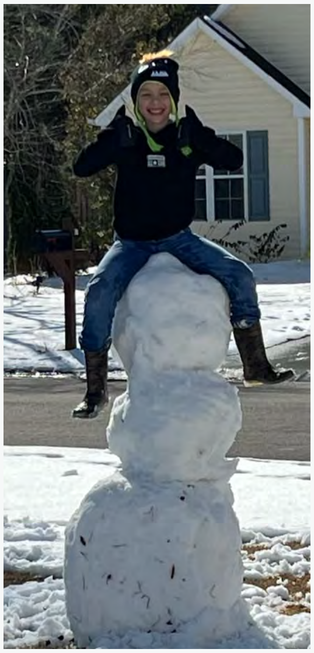
Thursday, November 28 Early close 2:00 pm

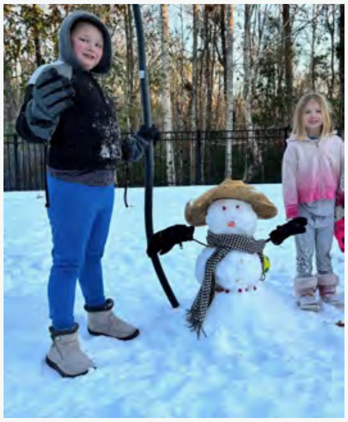
Wednesday, December 24 Early close 2:00 pm

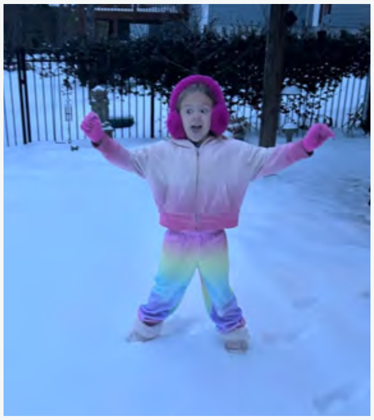
Thursday, December 25 Christmas Day

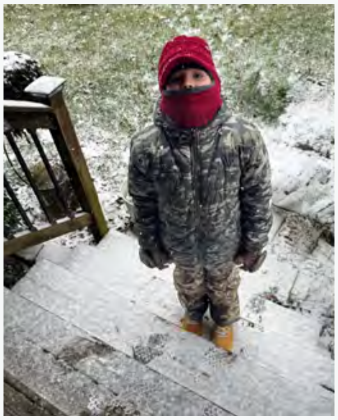










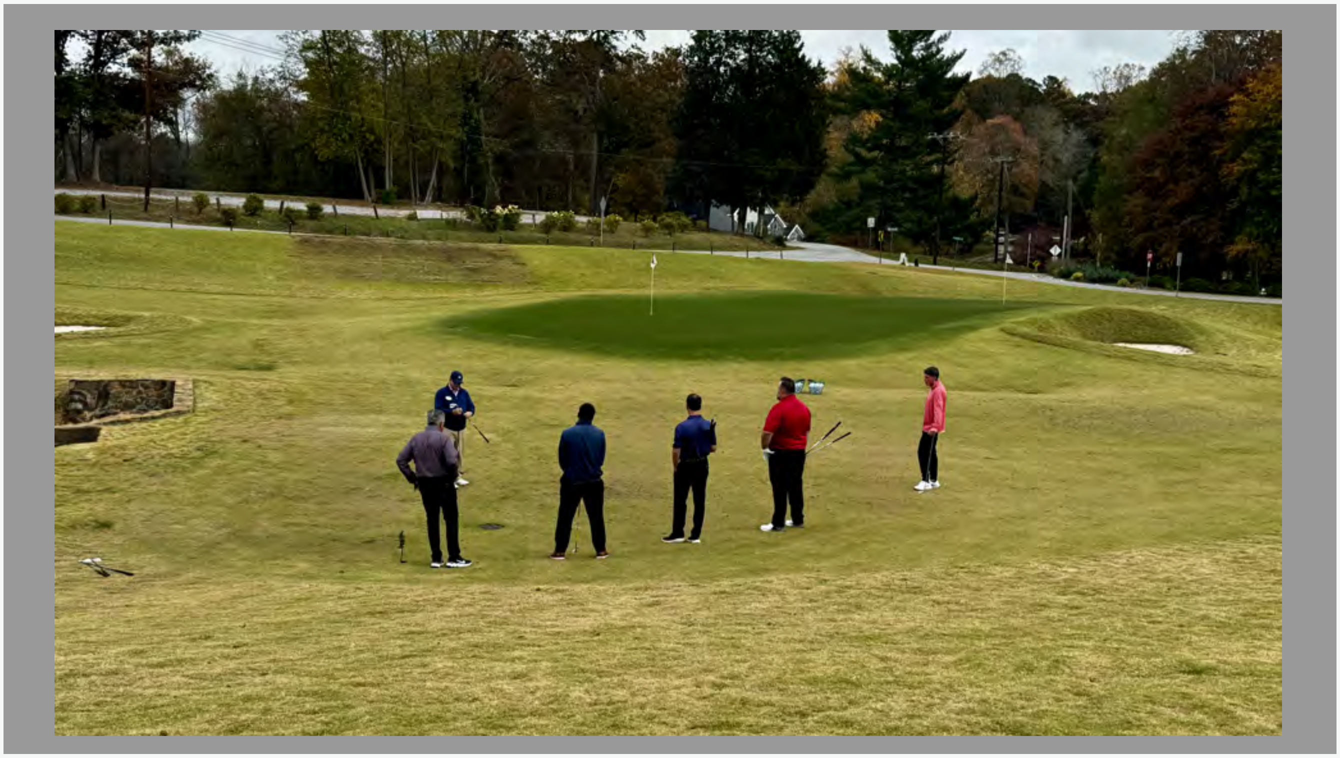


Closed Due to Weather in January

Our Wilmington office is accustomed to closing and working remotely due to inclement weather, during hurricane season. It came as quite a shock that for the safety of our team members and our clients we needed to close both Greensboro and Wilmington offices, for a few days, due to snow! Our kids certainly enjoyed every moment.

Events

We're excited to announce that we're planning to host several events throughout 2025! These events will provide valuable opportunities to connect with our team, learn from industry experts, and enjoy the company of other valued clients. Keep an eye on your inbox, and our website for upcoming invitations and save the dates for these engaging and informative events.

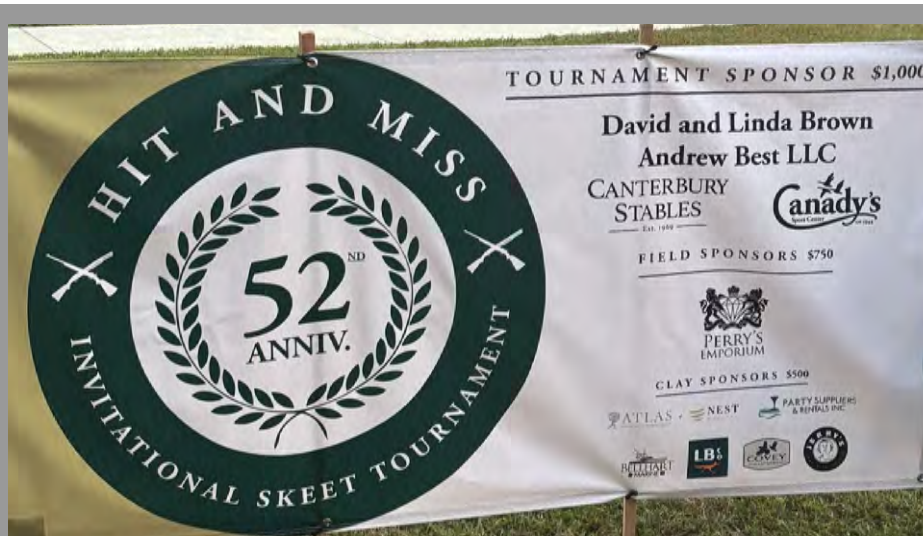


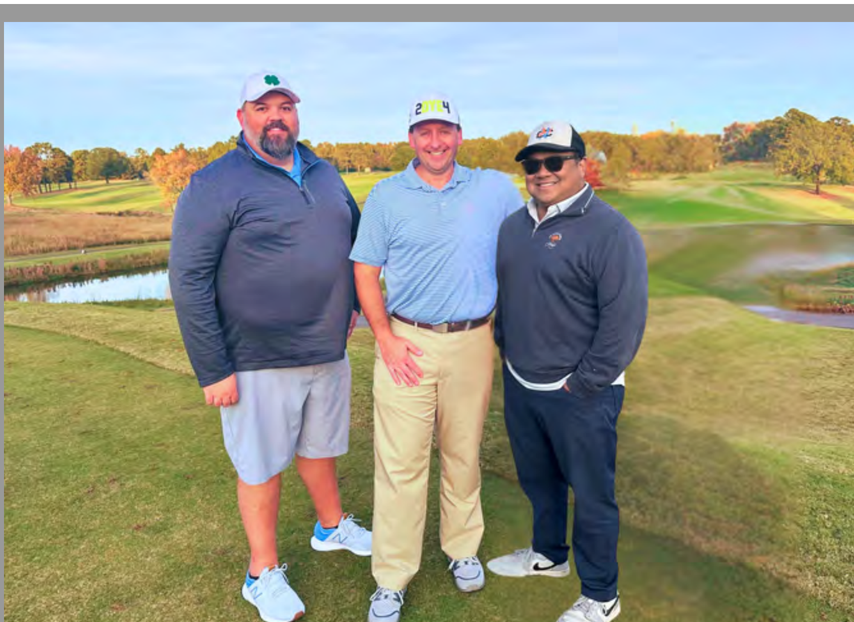
Fore! Clients Tee Off with Zach

We recently hosted a delightful day of golf and camaraderie at the prestigious Sedgefield Country Club in Greensboro, NC. Clients enjoyed a beautiful day on the course for a short game lesson, followed by an informative lunch. This exclusive event provided a unique opportunity for clients to connect with Zach *(Partner, Senior Financial Advisor)* outside of the office, while enhancing their golf game.

Creating a Lasting Impact: Community Outreach Initiatives

Jason Harris
Partner, Senior Financial Advisor
participated in the Hit And Miss Invitational Skeet Tournament, an outdoor sporting event proudly sponsored by Atlas Investment Management of NEST Capital. We enjoy these opportunities to support local community events.

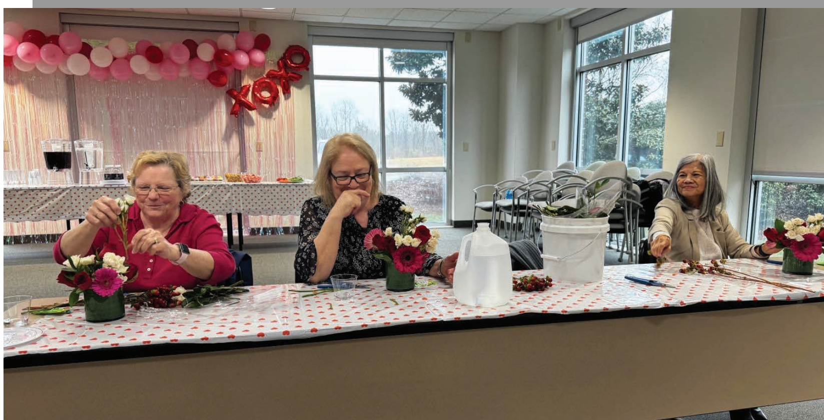


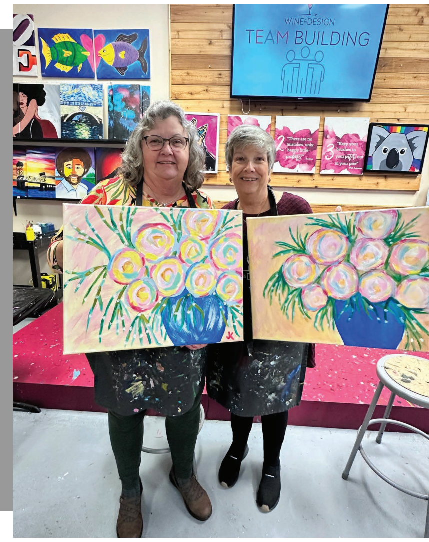


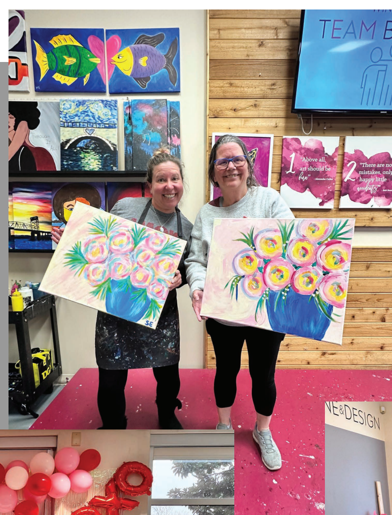
Partner and Senior Financial Advisors, Zach Edwards and Rusty Knowles, recently participated in the Haven's Foundation Golf Tournament. The Haven's Foundation provides critical support to sick children and their families, and we are proud to support their vital mission. Joining Zach and Rusty on the course was long-time friend Alex Flordelis, Regional Vice President at Guggenheim Partners.

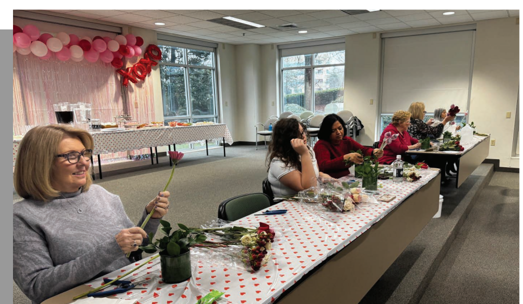
Galentine's Celebration

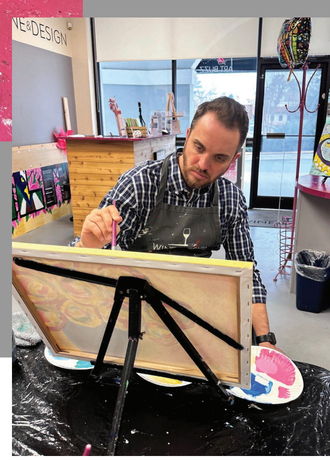
We hosted our first Galentine's events recently with wonderful ladies in both Greensboro, and Wilmington. We loved seeing everyone's creativity shine as they designed gorgeous floral arrangements and personalized paintings. It was such a fun and fulfilling experience , and we're excited to continue this tradition.

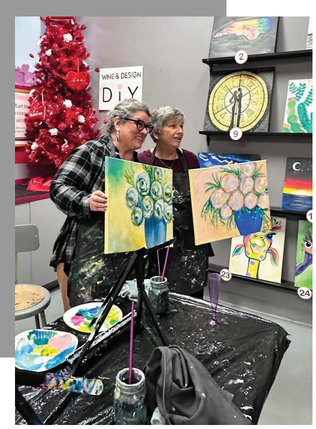




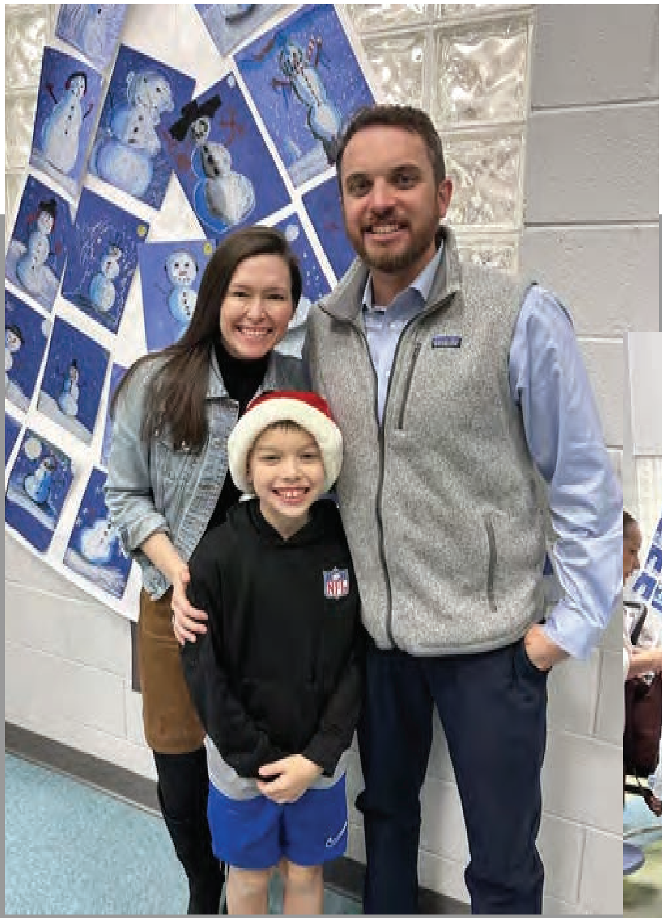


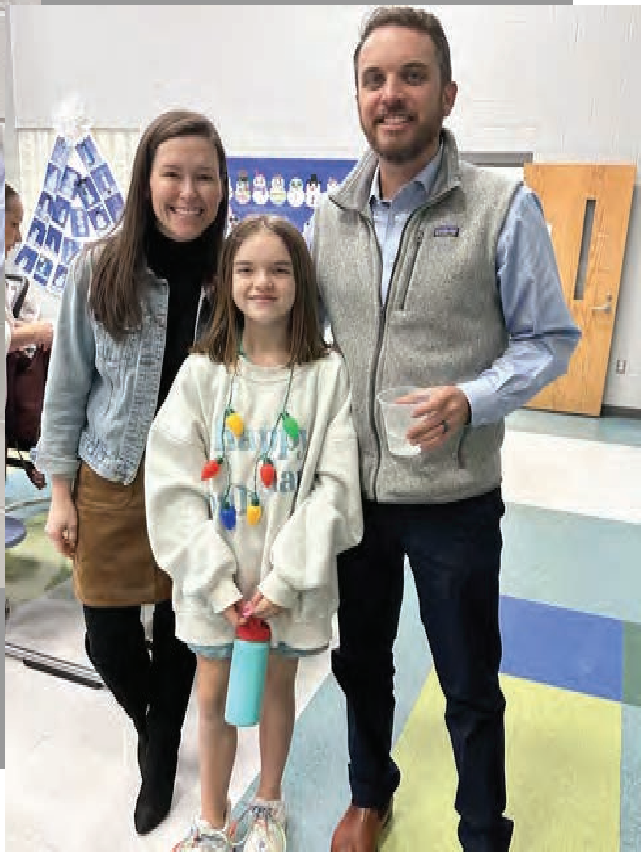




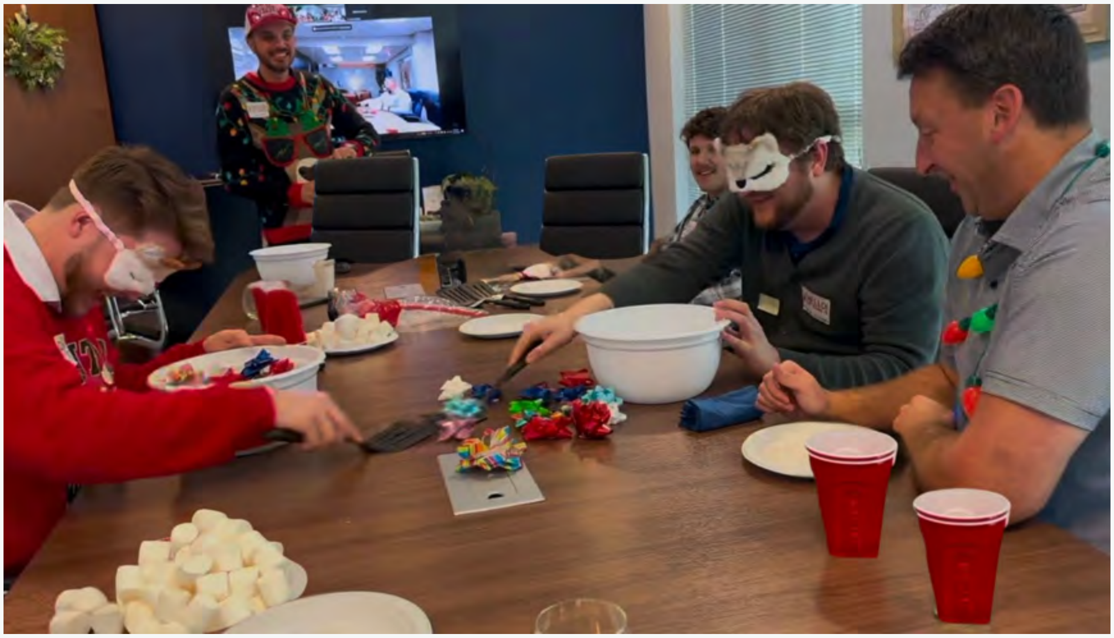


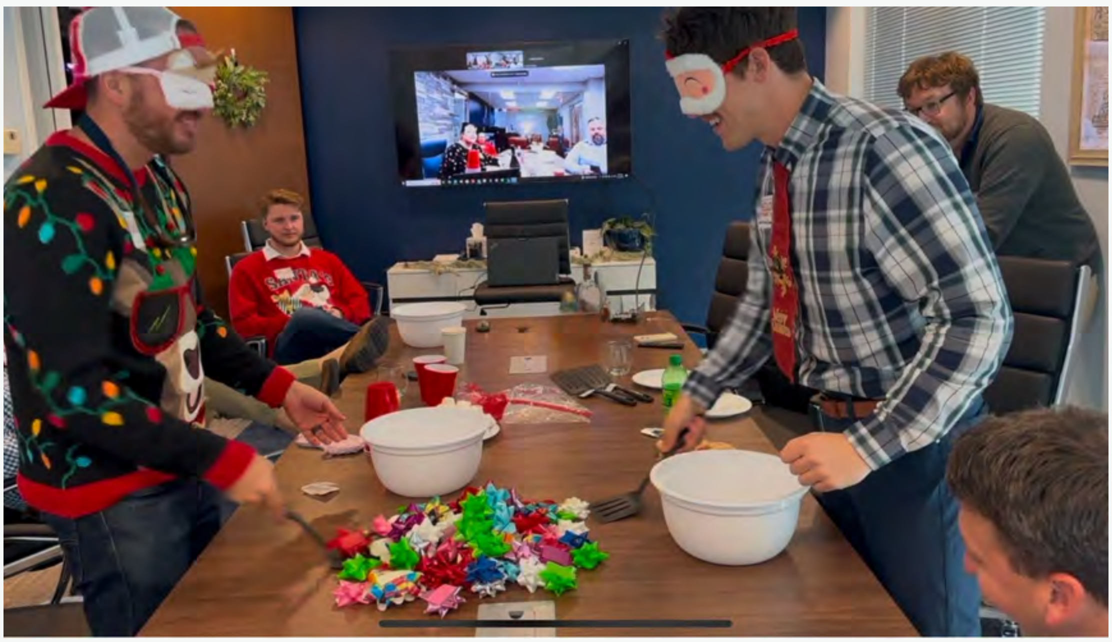
Adam Bolick *Partner, Senior Financial Advisor* & Marcy Bolick *Senior Registered Business Development Manager* pictured attending their children's school Christmas lunch.





Tis' The Season to Connect: Our 1st Holiday Bash





We celebrated our first-ever virtual holiday party in style, taking a trip down memory lane and reliving the joy of the holidays as kids! From reindeer games that brought out our competitive spirits, to a tacky attire contest that showcased some truly creative (and hilarious) outfits. It was an day of laughter, connection, and pure holiday fun.

At Atlas Investment Management of NEST Capital,
we're driven by a single goal: exceeding client expectations.
We believe that exceptional investment strategies are only part of the equation.
That's why we're equally committed to providing industry-leading client service.
From proactive communication and personalized portfolio reviews to readily available support and tailored financial guidance, we strive to build lasting relationships based on trust and understanding. We're so confident in the value we provide that we'd be honored to serve your family and friends. If you know someone who could benefit from our approach, we would greatly appreciate an introduction.

Greensboro: 743-230-2232 **Wilmington:** 910-834-6301 **atlasinvestmentmanagement.com**