

ATLAS of NEST
INVESTMENT MANAGEMENT CAPITAL
NEWSLETTER

Summer '25



Atlas Celebrates One Year of Independence

Atlas Investment Management recently celebrated one year of independence. When we embarked on this exciting journey as an independent practice, we were driven by a singular focus: to provide our clients with personalized, strategic, and unwavering financial guidance.

Today, as we celebrate this milestone, we extend our deepest gratitude to our clients, partners, and dedicated team who have made this first year a resounding success. We are proud of the progress we've made, the relationships we've strengthened, and the value we continue to deliver.

This anniversary is not just a reflection on the past, but a springboard for an even brighter future, built on trust, expertise, and a commitment to your financial well-being.





SERVICE STARS



April

Chris Neal
*Client Service
Advocate*



May

Jessica Edwards
*Content and Client
Engagement Manager*



June

Rebecca Johnston
*Client Service
Advocate*

Each month, we celebrate a team member who exemplifies exceptional work ethic and client service, as recognized by both colleagues and clients.

Congratulations to this quarter's honorees!



WELLS FARGO

Investment Institute

STATE OF THE MARKETS MONTHLY ROUNDTABLE

INVESTOR CONFERENCE CALLS



Please join Paul Christopher, Head of Global Market Strategy 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, Paul 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.

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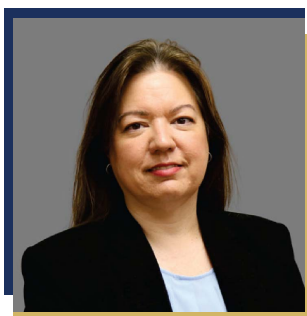
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Growth Mindset



Rebecca Johnston *Client Service Advocate*

We're excited to welcome Rebecca Johnston to the Atlas team as our new Client Service Advocate in the Greensboro office. Rebecca brings nearly 20 years of experience in banking, lending, and wealth management – including roles at USAA, Charles Schwab, and several regional banks. She brings a deep understanding of financial operations and regulatory standards to our organization. Rebecca is a proud military spouse, mom to two teenage boys, and a devoted dog lover. She's already making a meaningful impact, and we're glad to have her as part of the team.



Forbes SHOOK Miami Conference

Marcy Bolick (Senior Registered Business Development Manager) and Jessica Edwards (Content and Client Engagement Manager) proudly represented Katterhenry Investment Group of Nest Capital, a valued partner of Atlas Investment Management, at the prestigious Forbes SHOOK Best Teams Conference held recently in Miami, Florida. This exclusive event brings together top-performing wealth management teams from across the nation to share best practices, discuss industry trends, and foster connections. Marcy and Jessica had many great takeaways to share with the Atlas team.

Community Outreach



Rusty Knowles *Partner, Senior Financial Advisor* with long time friend Julio Monterrey attending Wilmington's historic Garden Party.

We're proud to support this beautiful event with a purpose-proceeds benefit local nonprofits doing meaningful work in our community.

We're proud to show our support several meaningful community organizations and events, including: the Wilmington Choral Society, The Purple Heart Dinner, Lower Cape Fear Life Care Last Chance for White Pants Gala, Cancer: Surviving and Thriving Golf Tournament, North Carolina Sports Hall of Fame Induction Auction, and the Spring Shamble Golf Tournament in Mooresville, NC.

Honoring a Legend



From left to right: Zach Edwards *Partner, Senior Financial Advisor*, Jessica Edwards, *Content and Client Engagement Manager*, Dale Inman, Mary Inman, Dr. Jenni Harris, and Jason Harris *Partner, Senior Financial Advisor*.

We were honored to attend the North Carolina Sports Hall of Fame Induction ceremony celebrating the remarkable career of Dale Inman. Joined by his wife Mary, Dale was officially inducted to NCSHOF, recognizing him for his contribution and legacy to the sport of NASCAR and our state.

His career includes eight Cup Series championships, 193 wins, seven Daytona 500 victories, and a record-setting 1967 season with 27 wins – including an astonishing 10 in a row! Dale helped revolutionize the role of crew chief and forever shaped the sport.

Congratulations, Dale, on this remarkable and well-earned honor!

People of the Practice

Partners and Senior Financial Advisors Adam Bolick and Rusty Knowles shared a memorable evening with their daughters, Hattie and Hannah, at a local Daddy-Daughter Dance. It was a night filled with smiles, sweet moments, and plenty of dancing.



The Bolick family- Adam, *Partner and Senior Financial Advisor*; Marcy, Senior Business Development Manager; and their children Hattie and Coy-enjoyed quality time and southern charm on a Spring getaway to the scenic Georgia coast.

Join us in celebrating ur intern extraordinaire, John Dungan on his graduation from UNCW with a Bachelor of Science in Finance. We're proud of all he's accomplished and can't wait to see what's next for his bright future!



Q3 Reminders



Estimated Tax Payments

The third quarter deadline is September 15th, 2025.

Please consult your tax professional if you pay quarterly estimated taxes.



Solo 401(k) & SEP IRA Setup

While the deadline for establishing a 401(k) or SEP IRA is typically the tax filing deadline, initiating the process in Q3, allowing ample time for plan establishment and contribution planning before year-end.



Required Minimum Distributions (RMDs)

Although the deadline is December 31st, Q3 is an opportune time to review your RMD requirements. Early planning helps avoid last minute distributions, and missed deadlines.



Charitable Giving Strategies

Discussing qualified charitable contributions in Q3 provides clients with sufficient time to implement these strategies before year-end.

Wells Fargo Advisors Financial Network does not provide legal or tax advice.

Office Closures

Thursday, June 19th *Juneteenth*

Thursday, July 3rd *Early Close 2:00PM*

Friday, July 4th *Independence Day*

Monday, September 1st *Labor Day*

Thursday, November 27th *Thanksgiving*

Friday, November 28th *Early Close 2:00PM*

Wednesday, December 24th *Early Close 2:00 PM*

Thursday, December 25th *Christmas*

Thank You for Your Trust

At Atlas Investment Management, we consider it a privilege to be part of your financial journey. Your confidence in us fuels everything we do, and we are grateful for the opportunity to support your goals with care, clarity, and commitment.

We're proud to serve you with a team that brings both expertise and heart to every interaction:

Adam Bolick, *MBA – Partner, Senior Financial Advisor*

Zach Edwards – *Partner, Senior Financial Advisor*

Rusty Knowles – *Partner, Senior Financial Advisor*

Jason C. Harris – *Partner, Senior Financial Advisor*

Marcy Bolick – *Senior Business Development Manager*

Jessica Edwards – *Content and Client Engagement Manager*

Troy Sharpe – *Wealth and Investment Planner*

Rebecca Johnston – *Client Service Advocate*

Chris Neal – *Client Service Advocate*

John Dungan – *Intern*

Thank you for your continued trust. We're here to help you navigate life's financial decisions with confidence.

We welcome connecting with you via our website and Social Media:



Atlas Investment Management | www.atlasinvestmentmanagement.com



www.linkedin.com/company/atlas-investment-management-of-nest-capital