



ATLAS
INVESTMENT MANAGEMENT

of



NEST
CAPITAL

FALL 2025 NEWSLETTER

Your Steadfast Partner Through All of Life's Seasons



Greensboro: 743-230-2232

Wilmington: 910-834-6301

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CONGRATULATIONS

Zach Edwards,
AWMA®

Partner, Senior Financial Advisor



Forbes

**BEST-IN-STATE
TOP NEXT-GEN
WEALTH
ADVISORS**

SHOOK® RESEARCH

2025



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2025 Forbes Top Next-Gen Wealth Advisors Best-In-State: Awarded August 2025; Data compiled by SHOOK Research LLC based on the time period from 3/31/24 - 3/31/25 (Source: Forbes.com). Fee paid for use of Marketing Materials. The Forbes Top Next-Gen Wealth Advisors Best-in-State rating algorithm is based on the previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

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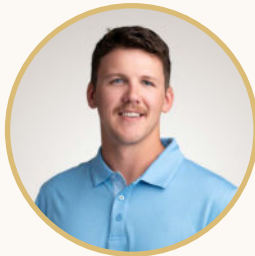
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Service Stars & Advisor Spotlight

Each month, we proudly recognize one member of our Service Team whose dedication, hard work, and willingness to go above and beyond make a lasting difference for both our clients and our team. We also shine a light on one of our Advisors who exemplifies exceptional leadership, client care, and commitment to excellence. These monthly spotlights are our way of celebrating the people who embody our values and consistently deliver the high standard of service our clients deserve.

SERVICE STARS

JULY



Troy Sharpe
Wealth and Investment Planner

AUGUST



Rebecca Johnston
Client Service Advocate

SEPTEMBER



Rebecca Johnston
Client Service Advocate

ADVISORS OF THE MONTH

JULY



Rusty Knowles
Partner, Senior Financial Advisor

AUGUST



Jason Harris
Partner, Senior Financial Advisor

SEPTEMBER



Zach Edwards, AWMA®
Partner, Senior Financial Advisor

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Outside the Office

BACK
to
SCHOOL



Hattie & Coy Bolick



Greyson Knowles

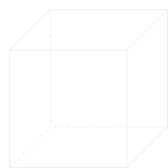


Kabrey Edwards



Liam Edwards

ABC



$2+2=?$



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Events



2025 FINET CA Connect Conference

Celebrating client experience excellence with Chris Neal, Client Service Advocate! Chris attended the 2025 FiNet CA Connect Conference with some of our friends at NEST Capital. He attended with Leslie Arnold, Director of Client Service & Experience at NEST Capital and Kendra Roberts, Client Experience Liaison at Katterhenry Investment Group of NEST Capital. Together, they joined over 140 other client associates from across the country to dive into firm-wide updates, technology upgrades, and best practices - all with the goal of elevating the client experience.

Arlington-IGNITE Conference

Our very own Adam Bolick, Rusty Knowles, and Zach Edwards attended the 2025 FiNet Annual Conference – IGNITE in Arlington, Texas. The conference is held once a year featuring topics centered around innovative practice management ideas, technology, and client relationships, designed with growth and success at the forefront.

Pictured: Eric Haubert, Owner, Senior Financial Advisor at NEST Capital; Lisa Katterhenry Howe, Owner, Senior Financial Advisor at NEST Capital; Dan Campbell, Partner, Senior Financial Advisor at Campbell Morrison Wealth Management of NEST Capital; Rod Morrison, Partner, Senior Financial Advisor at Campbell Morrison Wealth Management of NEST Capital; Zach Edwards, AWMA®; Rusty Knowles; Adam Bolick; Courtney Rainey, Executive Director, Northeast FiNet Divisional Leader at Wells Fargo Advisors



Sponsorships

CAPE FEAR PURPLE HEART DINNER



Adam & Marcy Bolick, Jason Harris, and Rusty Knowles were honored to sponsor and attend the Cape Fear Purple Heart Dinner, paying tribute to the brave men and women in our community who have received the Purple Heart.

LAST CHANCE FOR WHITE PANTS GALA



Our team was a proud sponsor of Lower Cape Fear LifeCare's Last Chance for White Pants Gala. Lower Cape Fear LifeCare works to provide access to the highest quality LifeCare, education, and supportive services to our patients, their families, and the communities we serve. In attendance was Rusty Knowles, Kendall Hack, Charity Bolick, Marcy Bolick, Adam Bolick, and Hunter McLaughlin.

WYNDHAM GOLF TOURNAMENT



Zach Edwards, Adam Bolick, Rusty Knowles, attended the Wyndham golf tournament with Cameron De Iuliis from Pacer Financial, Inc.

CANCER: SURVIVING & THRIVING GOLF TOURNAMENT



Surviving and Thriving Golf Tournament in 2021. Our team has been proud to support this event. This tournament is about more than golf - it's about raising funds for vital cancer survivor research at Duke University School of Medicine and standing alongside those whose lives have been touched by cancer.

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.

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Investment and Insurance Products: ➤ NOT FDIC Insured ➤ NO Bank Guarantee ➤ MAY Lose Value

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Q4 Reminders



QUALIFIED CHARITABLE CONTRIBUTIONS

As we approach year-end planning, a strategy that may benefit you if you're subject to Required Minimum Distributions (RMDs) from your IRA is called a Qualified Charitable Distribution (QCD).

A QCD allows you to donate up to \$108,000 in 2025, which adjusts for inflation, directly from your IRA to a qualified charity. The amount you give counts toward your RMD for the year—but unlike a regular distribution, it's excluded from your taxable income. This can be a powerful way to support causes you care about while potentially reducing your tax liability.

To qualify:

- You must be age 70½ or older at the time of the distribution.
- The donation must go directly from your IRA addressed to the charity.
- The receiving organization must be a 501(c)(3) public charity (not a donor-advised fund or grant-making foundations).

If you're already planning charitable giving, this approach could be a win-win. Let us know if you'd like to discuss if a QCD makes sense for you, or anyone else you know who could benefit from this.

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



KEEP YOUR INFORMATION UP TO DATE WITH ATLAS

Have you recently moved, changed jobs, or updated your contact information? Help us stay connected by letting us know! Keeping your details current helps ensure we can continue providing timely updates and service without interruption. If you've had any recent changes to your address, employment, phone number, or email, please take a moment to update your information with us.



REFERRALS

We cherish introductions to family and friends as our HIGHEST COMPLIMENT. If you have found our advice beneficial and our team helpful, please pass along our information. We appreciate the opportunity to be of service!

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Thank you for your trust!



Zach D. Edwards, AWMA®
Partner, Senior Financial Advisor

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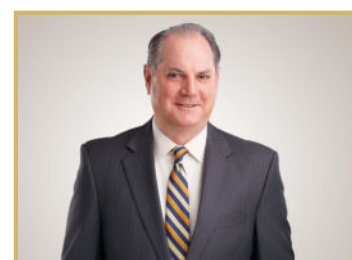
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Content and Client Engagement
Manager

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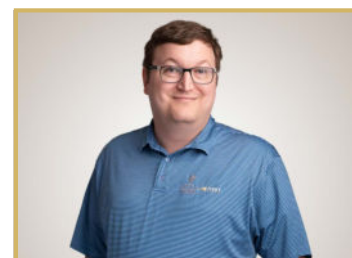
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Chris Neal
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