WEALTH MANAGEMENT SERVICES, LLC
DECEMBER 2017

CHRISTOPHER CALANDRA
CERTIFIED FINANCIAL PLANNER ™

A YEAR IN REVIEW-ELLIOTT WEALTH

***From everyone at Elliott Wealth Management*:** Reflecting on the past year, we would like to thank everyone for your support and contributions to our success. We would like to share with you what each of us has accomplished during the year and what our goals are for next year. **We wish you all happy holidays and a prosperous 2018!**

Christopher Calandra

"THE FAST IMPROVING US ECONOMY AND EXPECTED TAX REFORM LEGISLATION WILL LIKELY MEAN THAT 2018 IS A YEAR OF CHANGE."~CC.

Chris celebrated his 25th year helping people achieve their financial goals and objectives. It was a year of innovation and improvement for Chris and for Elliott Wealth Management Services, LLC.

Chris' initiatives for team development and their improving proficiency led the way for improved operational efficiencies at the practice. He also launched the weekly ***Simply Financial PodCast*** as an innovative way to communicate information and ideas to help improve the financial IQ of our clients, potential clients, and other professionals. Throughout 2017, Chris, Elliott Wealth and most importantly, our clients, benefited from the success of the markets.

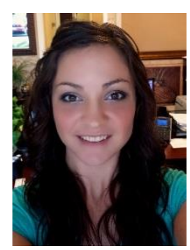
Chris' abilities to explain complicated financial concepts in an easily understood manner helps empower investors to make informed decisions. He is a well read, experienced and an informed decision maker who brings a well-rounded, worldly and sophisticated perspective to financial planning.

His focus is to put the needs of the clients first.

This year, Chris enjoyed the family vacations to the Rhode Island shore and to Florida and he loved touring colleges with Marissa, his oldest daughter. He also enjoyed coaching Dominic's 6th grade football team this fall.

2018-Chris will be analyzing and taking advantage of opportunities presented by the expected Tax Reform. He will be preparing for a changing market landscape and the impact of geo-political risks, shifts in the economy and the political landscape. He will look to adopt technologies that will help the team at Elliott Wealth to better serve our clients.

Lindy Brock



"I PUT OUR CLIENT'S INTERESTS AHEAD OF OUR BUSINESS' INTEREST."*~LB.*

Lindy celebrated her third year as a team member of Elliott Wealth in 2017. It was a year of advancement and development for her. She began the coursework to become a Certified Financial Planner™. There are 6 courses and the curriculum typically takes 2 years to complete. Once the coursework is completed she is expected to take the comprehensive exam in 2018. For more information on the CFP® designation, please listen to our PodCast: **Episode 2: *What is a CFP®*** which originally aired on 08/11/2017.

During the year, she recorded two PodCasts with Chris and was a guest on his *Business Buzz* radio show on

January 30, 2017. In 2017 she prepared her first Financial Plan and met with a large number of clients helping provide a high level of service. She is transitioning to the role of a Financial Advisor as of January 01, 2018, enabling her to work even more closely with clients.

Lindy brings a willingness to compassionately sit down with clients and take the time to mindfully listen and identify their needs. She remains FOCUSED on enhancing client relationships. Our clients can count on her high levels of integrity, honesty and reliability.

Lindy's daughter, Makaiya, started high school this year and is enjoying participating in the JROTC program. Lindy finally got her first deer this year, but has been once again out-hunted by her husband DJ. Lindy will be spending the last week and a half of the year on vacation trying to change that.

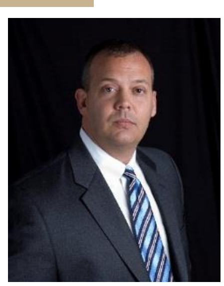
2018-Lindy will be working even more closely with clients, conducting more client meetings and making recommendations to the client's financial plan. She will focus on preparing and presenting financial plans while continuing to be educated and increasing her involvement in client meetings.

Lindy will focus on working with woman and younger clients (refer to PodCast **Episode 17** ***on 12/12/2017 and*** **Episode 18** ***on 12/19/2017***).

Dean Nicholson

After beginning the process of merging his practice with Chris and EWMS in August of 2016, he continues to be a resource by helping his clients and EWMS through the transition. He enjoys spending time with his family and now has more time to spend pursuing other interests including cycling, golf and bible study.

Buddy Hartmann



"MY ALLIANCE WITH ELLIOTT WEALTH HAS BEEN A VERY GOOD PARTNERSHIP THAT HAS FLOURISHED" ~BH.

In 2017 Buddy completed his second year at Elliott Wealth and his relationship with the company has continued to flourish. In 2017, he began his coursework to obtain a CDFA (Certified Divorce Financial Analyst). He should complete the requirements early in 2018.

Together with Chris, he developed a program and syllabus and rolled out a course for the ILR *(Institute for Learning in Retirement*). Feedback and evaluations were fantastic, and they plan on conducting more courses.

He carries a tremendous amount of experience and knowledge into every client conversation, while focusing on caring about identifying and meeting clients' needs. His integrity and passion always shine through and can felt in every client meeting.

Buddy hit a milestone birthday this year…50 and committed to training for a *Half Iron Man*.

2018-Buddy will be expanding the ILR program and courses, as well as other webinars and seminars. He will also be launching new initiatives to help EWMS attract and retain clients. Once his CDFA is attained, he will be expanding his area of practice to better meet the needs of the spouses recently divorced, especially those individuals who do not have fiscal responsibility within the family unit.

David Lake

"IF YOU ARE NOT GOING TO WIN THE RACE, MAKE THE ONE WHO IS AHEAD OF YOU BREAK THE RECORD"-DL.

In 2017, Dave celebrated his 9th year of being in practice and opened a new office in Madison, CT. Revenues for his practice are up over last year and his client base continues to increase. He has begun looking hard at potential Tax Reform and the impact it could have on the financials and taxes of his clients.

Dave has a great ability to grasp tax law and convert it to "everyday language" so his clients understand the tax implications and strategies that best suit their situation. He is tremendous with numbers and knows how to apply his twenty-five years of experience to better the financial situations of his clients.

During the year, Dave became a Great Godfather for the first time. He takes this seriously and is understanding the challenges of a younger generation better than ever. His Goddaughter relocated this year to Connecticut from New

Mexico, so he can now apply the Godfather responsibilities locally.

2018-Dave will continue to expand his services and grow his offices and client base. He will be sharing his tax expertise as it relates to Tax Reform and will be working on creating even stronger relationships with his existing clients.

Britanni Edwards

"WHATEVER IT TAKES, WE WILL GET IT DONE"~ BE.

Britanni celebrated her first year as a member of the Elliott Wealth team in 2017. She is amazing with her desire to increase her knowledge of the industry. Throughout the year, she has been able to field and answer more client questions, communicate more effectively with clients directly and has been able to confidently establish higher levels of trust with our customers.

Her strengths and qualities include promptness in meeting customer needs and organizing her time and tasks. Her number one goal remains to build long term customer relationships and she has grown tremendously in this area.

Britanni and her husband Dustin are pleased to announce that they are expecting their second child in July of 2018. Britanni's oldest daughter Shaylynn started Pre-K this year and will be entering kindergarten. Also, her family celebrated their first full year in Florida after relocating from Illinois.

2018- Britanni will continue to increase her knowledge of the industry allowing her to effectively and efficiently help our clients and the entire Elliott Wealth team be successful. Her number one goal for the new year is to always meet client needs and always exceed their expectations.

Paul Mathews

"CUSTOMER SATISFACTION IS FOR THE MEDIOCRE, EXCEEDING CUSTOMER EXPECTIONS IS FOR THE ELITE."-PM.

Paul completed his second year with Elliott Wealth in 2017. He was involved with the launch of the social media company pages, revamp of the website, launch of the PodCast and customer data integration and system efficiencies.

He is a natural leader and coach with strong abilities to identify needs, create and implement solutions and communicate those solutions to leadership and clients.

Paul coached Babe Ruth All-Stars this year and for the first time in his town's history, the all-star team competed in the state championship game. His teams won several tournaments and competed in two league championships. His number 1 pitcher, also his son, continued to find himself on the distinguished honors list. He also further immersed himself into the world of special needs and loves to share in his daughter's successes.

2018-Paul will keep Elliott Wealth technologically savvy. The PodCast and Social Media development and new best practices will keep him busy.

Joelle Calandra

"HAPPY CUSTOMERS MEANS HAPPY BOSS; HAPPY BOSS MEANS HAPPY HUSBAND."~ JC.

In 2017, Joelle took on additional important responsibilities at the firm including tracking Assets Under Management progress as well as the clients and business Matrix. Additionally, she has advanced into the role of event planner and handles all event gifts, special occasion gifts and the birthday campaigns.

She is very organized when it comes to the events, finances and business process which translates into team cohesiveness and positive impacts on the clients' experience. She is client centric and strong in the areas of communication and relationship building. She also continues to manage all company fiscal responsibilities.

She is going through the college process with her oldest, her daughter Marissa. Marissa also has gotten her license this year. Consequently, Joelle is preparing for Marissa to attend college outside the state of Connecticut. She has watched her son Dominic thrive through successes and adversity in sports and starting middle school. He is getting more responsible and independent before her eyes.

2018- Joelle will be involved in new initiatives for client events and a contributor to Social Media and the PodCast production as well as share responsibility for development of other knowledge centers within multi-media.

Help us grow in 2018!

This year, one of our goals is to offer our services to several other people just like you!

Many of our best relationships have come from introductions from our clients.
Do you know someone who could benefit from our services?

We would be honored if you would:

- **Add a name to our mailing list,**
- **Bring a guest to a workshop,**
- **Have someone come in for a complimentary financial checkup.**

Please call: Christopher Calandra at Elliott Wealth Management Services, LLC at (888) 959-5904 x 1 and we would be happy to assist you.

SIMPLY FINANCIAL with CHRIS CALANDRA PODCAST LIBRARY-Brought to you by Elliott Wealth Management Services, LLC

Simply Financial with Christopher Calandra, CFP is an innovative, comprehensive, informative and cutting-edge Podcast that discusses financial topics ranging from personal finance, economics, politics and personal growth. Simply Financial will cover intriguing and thought-provoking questions so that the listener can simply increase their financial IQ

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As always, we appreciate the opportunity to assist you in addressing your financial matters and look forward to seeing you soon! Please enjoy the rest of 2017 and Best Wishes for a prosperous 2018

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