



We have exciting news!

As you all know, throughout the years, I have always been committed to providing you with the highest standard of discretionary investment management, financial planning, and customer service. However, as my practice has grown, the amount of back-office work required to maintain proper records and ensure compliance with government regulations has also grown.

That's why I am very excited to share with you that I am joining OneAscent Wealth Management, another financial advisory firm that shares my personal and professional values and my desire to serve my clients with excellence.

This will add members to my team who will help me with much of the behind-the-scenes work involved with managing my business, such as paperwork, administration, record-keeping, and compliance. Working with OneAscent's team will also allow us to offer you some additional customized services, including specialized investment solutions and financial planning services.

As you know, we have always taken great pride in providing you with personal service and attention. I wholeheartedly believe that joining OneAscent will allow me to continue to serve each of you even more effectively.

From your perspective, there will be very few changes. Edna and I will continue to serve you from our current office location. The process for you is simple and straightforward. Once you have signed the new paperwork **that we will provide over the next few weeks**, we will be able to continue serving you as we always have. **(Please see the "Frequently Asked Questions" document that is attached for additional information.**

I am excited about this new relationship and know it will be beneficial to my firm and to you, my valued clients.

I will look forward to discussing this further with you very soon!

Best Regards,

A handwritten signature in black ink that reads "Donna L. Jordan". The signature is written in a cursive style.

Investment advice offered through OneAscent Wealth Management, LLC