

## Academy Financial, Inc. Welcomes Seven New Team Members So Far In 2021

Academy Financial, Inc. is an independent wealth management firm headquartered in Lutherville, MD that focuses on providing clients a holistic financial plan based on their specific goals and expectations. Academy's focus is on the long-term wellbeing of our clients, built on a longstanding relationship, with a foundation of trust and confidence. Our clients expect leadership from us in the areas of Integrity, Objectivity, Professionalism, and Technology.

Academy is thrilled to announce that we have added seven new members to our team so far in 2021! It started in January with Wendy Sinclitico joining as the Practice Manager for Planner Rich Craft to help deliver excellent support and service to the clients of their growing practice. In April, we added two new Financial Planners, Dennis Bauernschub and Jim Metzbowler to Academy. Dennis and Jim saw the value to their clients and business by being part of Academy and plugging into resources and new partnerships available at Academy. In May, Academy added Patrick McCabe as our new Investment Processor. Pat brings a wealth of experience to the position where he is responsible for generating and processing paperwork for new accounts and assisting on the investment side with trading and reports. In June, Dimitri Hobbs graduated from University of Maryland and became a full-time planner assistant supporting the practice of Partner, Brent Kvech. Dimitri started as an intern with Brent and Academy during the Summer of 2020 and is now focused on providing top-notch service to clients. In July, Academy added two more employees. Vickie Frazier joined as a Practice Manager for Jon Parks. She will be helping with daily operations of Jon's practice to service clients and grow the business. In addition, Blake Gaulden joined the team as our new Chief Investment Officer and comes to Academy with many years of experience directing investments. He will take over the investment department and continue to add value to our Academy Associates by managing the portfolios for our clients through asset allocation, risk management, and security and product selection. Early September saw the addition of Will Horn joining the practice of John Horn in Berwyn, PA. Will joins as an Implementation Coordinator focused on executing a client service model to the growing practice.

Academy's core philosophy of Evaluate – Envision – Execute has resulted in continued growth of the firm. Academy is celebrating 29 years in business with 6 different locations across 3 states. Academy currently has 19 advisors, 19 staff members, and over \$1 billion of client invested assets (as of January 1, 2021). We are thrilled to welcome these new teammates and look forward to delivering continued excellent service to our clients.



Our new hires enjoying the Orioles at an Academy team outing.  
Not pictured- Will Horn.

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