



Firm Annual Report



January 2023 -
December 2023

Annual Client Letter

Dear Brandt Wealth Management Clients,

This past year was certainly an eventful year both for the overall market and for us here at Brandt Wealth Management. Most analysts called for a recession and a down market this past year. With the continued War in Ukraine, the conflict going on the Gaza Strip, a Banking Crisis, a downgrade of the U.S Credit rating and our continued circus with our politicians, one would think the market would have gone lower. The Magnificent Seven though lead the market throughout the year with the remainder of the market playing some catch up late in the year.

Looking forward to 2024, we are in an election year, we tend to be pessimistic regarding elections and the market, yet history tells us that with an incumbent is running, the market tends to grind higher. Put me in the camp of the market being in the plus and minus 5% or so range and ending the year up. I favor defensive stocks like Health Care and Utilities, but also believe that Cyber Security and sections in technology will continue to climb. We also like Intermediate Bonds in an environment with falling interest rates

On a personal front, in April I got news from my doctor that my Cancer had come back. So I spent a large portion of the summer working in the morning and getting radiation treatments in the afternoon. But alas, I am currently cancer free and through the wonders of Ozempic lost some unwanted weight.

The end of May saw us pass our 5th year anniversary since moving our business over to Raymond James. June brought us Nate and Melanee's wedding, both the ceremony and the whole time leading up to it as well as the remainder of the year has been so special and wonderful for my wife and myself.

In April we added a Wine Tasting event to our robust Client event package here. Even though our Golf Outing in July and Pig Roast in August happened to be on the hottest days of those months, they were both well attended and a success. The Christmas Parade event in December continues to get bigger and better each year as Laura and Vicki help make this event a must attend.

As always, we are honored and humbled that you have given us the opportunity to serve you and your families as your financial advisor. This is something that we relish and take very seriously.

Your Trusted Advisor,
Clay W. Brandt
Senior Vice President, Investments
CERTIFIED FINANCIAL PLANNER™

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2023 By The Numbers

14

Clients Retired

505

Client Households

29

New Client Households

210
Million

Client Assets Mangaged

24 - CFP[®],
8 AIF[®]
+ 40
Webinars Watched

Hours of Continuing Education

2

Conferences Attended

Net New Assets - \$17,000,000

Client Segmentation

| Age Range | Relationships | Age Range | Relationships |
|-----------|---------------|-----------|---------------|
| 75+ | 108 | 55-59 | 51 |
| 70-74 | 54 | 45-54 | 67 |
| 65-69 | 58 | <45 | 61 |
| 60-64 | 82 | Other | 9 |

2023 Year in Review

January 3, 2023 – Clay takes family to Puerto Vallarta Mexico for vacation (see page 7 for family photo in our Hawaiian shirts).

January 31, 2023 – Clay named to 2022 Five Star Wealth Manager by Milwaukee Magazine

February 22, 2023 – Archie turned 2 years old. He is now the part time office mascot/security because he barks too much (see page 7 for photo).

April 3, 2023 – Clay gets diagnosed with prostate cancer.

April 17, 2023 – Clay completes his 16th year as a Burlington Park Board Member.

May 6, 2023 – Vicki Spinler's 4th year anniversary of being at Brandt Wealth Management.

May 13, 2023 – Nate's 5th year of being an Accredited Investment Fiduciary (AIF®). Nate is actively pursuing managing more 401(k) plans.

May 15, 2023 – Clay and his wife Karen 4th year with their rescue dog Sadie from Lakeland Animal Shelter in Elkhorn, Wisconsin (see page 10 for photo).

May 25, 2023 – Clay and Nate's 5th year anniversary of being with Raymond James after coming over from Wells Fargo Advisors.

June 3, 2023 – Nate and Melanee get married at The District in Richmond, Illinois. Nate's brother Ryan officiated a beautiful ceremony. (see photos on page 9).

August 25, 2023 – Nate and Melanee travel to Nashville as part of 1/3 Honeymoon Trips (see page 8 for photo)

September 2, 2023 – Clay and Karen travel to Niagara Falls to explore and watch the Rod Stewart concert (see page 7 for photo).

September 15, 2023 – Nate and Melanee travel to Phoenix to see his brother's Ryan and his husband Chris as part of 2/3 Honeymoon Trips (see page 10 for photo).

October 9, 2023 – Clay and Nate go with Clay's client/best friend Tom Muench and Nate's wife Melanee to Las Vegas, Nevada to watch the Green Bay Packers play the Las Vegas Raiders on Monday Night Football (see page 8 for photo) we are now 1-1 on Packers road trips.

November 17, 2023 – Clay and Karen travel to Las Vegas, Nevada to explore and watch another Rod Stewart concert their 2nd of the year (see page 10 for photo).

November 30, 2023 – Nate and Melanee travel to Orlando for there final Honeymoon trip to go to Disney World 2 days (Magic Kingdom & Hollywood Studios) and play golf at Disney Magnolia Course and watch an Orlando Magic game.

Brandt Wealth Management 2023 Client Events

APR. 27

Brandt Wealth Management Wine Tasting at BJ Wentker's Historic Fine Dining in Burlington, WI

Sponsored in part by Voya and Brandt Wealth Management. Raymond James is not affiliated with Voya.

JUL. 27

Brandt Wealth Management Golf Outing at Hawk's View Golf Club

Sponsored in part by Brandt Wealth Management and JPMorgan. Raymond James is not affiliated with JPMorgan.

AUG. 17

Client Appreciation Pig Roast at Echo Park in Burlington, WI

Sponsored in part by Gabelli Funds & Franklin Templeton.. Raymond James is not affiliated with Gabelli Funds or Franklin Templeton.

NOV. 5

Green Bay Packers vs. Los Angeles Rams Viewing Party at Plaza Theater

Sponsored in part by PGIM. Raymond James is not affiliated with PGIM.

DEC. 1

Burlington Christmas Parade Watch Party at Brandt Wealth Management on Pine Street

Sponsored in part by Brandt Wealth Management.

Look forward to more events coming in 2024!

Brandt Wealth Management 2023 Photo Review



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We continue working to leave the world in a better place than we found it, collectively endeavoring to align our values with money, provide a sense of security and legacy for our loved ones, and be responsible stewards of the planet.

Above all, Brandt Wealth Management does not exist without our invaluable clients and incredible team members, nor the vast community of supporters and collaborators who come together to infuse the company with its authenticity and uniqueness. There is simply no Brandt Wealth Management without you.

To each of you, we say thank you for your kindness, curiosity, critiques, and connection. We hope to always honor our investment in us.



Brandt Wealth Management

116 North Pine Street, Burlington, WI 53105 | P: (262) 661-4242

www.brandtwealthmanagement.com

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