

NEWS RELEASE

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CrossBridge Wealth Management & Benefits Group announces Donna W. Guinn as Senior Vice President and Associate Partner.

Johnson City, TN– CrossBridge Wealth Management & Benefits Group, a comprehensive wealth management, financial planning and corporate benefits consulting firm, today announced the addition of Donna W. Guinn as a Senior Vice President and Associate Partner. Donna, a 27 year veteran of the wealth management and financial planning profession, will serve her clients and join Crossbridge’s team of advisors in their Johnson City, Tennessee office, located at 121 Boone Ridge Rd., just off the Boones Creek exit.

“We recognize that East Tennessee and Southwest Virginia is a dynamic marketplace for professional financial planning services,” said B.W. (Brad) Fullington, CFP®, Chief Executive Officer and founding partner of Crossbridge Wealth Management Group. “Our firm has been considering strategic growth opportunities in the rapidly progressing market place. Adding Donna Guinn, who is a person of high moral standards and high personal integrity, in addition to her 27 years of experience, is a tremendous opportunity for our firm to further its vision of being the most trusted and premier comprehensive wealth management firm based in East Tennessee.”

Donna has spent her entire 27 year career with a large national brokerage firm and has seen many changes in the financial industry. Guinn says, “It used to be that to offer high quality financial advice, an advisor had to be with a national brokerage firm. However, in recent years, with the proliferation of comprehensive financial planning, the industry has changed to the point where it is extremely advantageous to clients of financial advisors, and to financial advisors alike, to work with a local, independent comprehensive financial planning firm.” She continues, “The ability to



associate with a comprehensive financial planning firm and have complete independence as it relates to client relationships, investment advice, and product offerings, is of the highest importance to me. Joining such a highly respected firm as Crossbridge affords me and my clients the perfect mix of independence and professional experience.”

“The financial planning arena continues to grow increasingly more complex. Providing comprehensive wealth management advisory services requires a broad range of knowledge and expertise, more than any one or even two individuals can master and provide” Says Guinn. “Crossbridge, which uses a specialized team approach to comprehensive financial planning, greatly increases my ability to service my clients.”

Crossbridge has chosen to work with Woodbury Financial Services, Inc, member FINRA and SIPC as their broker/ dealer. Fullington says. “The fact that we’ve chosen to work with Woodbury Financial Services, Inc.® an independent broker/dealer, means that our firm remains independent, as well. We are free to act solely in our client’s best interest, without bias and without pressure to promote a particular product or a particular strategy. It’s a model that differs from that of some other, larger financial firms known as wirehouse brokerages, whose financial representatives are accountable not just to their clients, but also to the parent company that employs them.” Crossbridge and Woodbury, however, are not affiliated entities.

Crossbridge Wealth Management & Benefits Group is a fully independent and comprehensive asset management, financial planning and benefits consulting firm based in Johnson City, TN with associate wealth and benefit advisors in Morristown, TN and Knoxville, TN. The firm’s professional advisors consist of CERTIFIED FINANCIAL PLANNER™ practitioners, Attorneys, CERTIFIED INVESTMENT MANAGEMENT ANALYST, investment advisor representatives and life and health insurance professionals.

To learn more about Crossbridge Wealth Management & Benefits Group visit www.CrossbridgeWealth.com , call a professional wealth or benefit advisor locally at 423-477-4311, 423-979-0311 or toll free at 877-975- P-L-A-N (7526) or e-mail info@CrossbridgeWealth.com