

THANK YOU

—— *Dr. CC Anthony* ——

Thank you for spending time with me today.

I'm pleased to share that I have recently transitioned from Edward Jones and now serve as an independent investment advisor and broker.

I am affiliated with Osaic, a nationally recognized wealth management firm with decades of experience supporting advisors and their clients. Osaic is consistently ranked among the top firms in the industry for empowering advisors to operate independently while delivering a more personalized and elevated client experience.

My practice, OAK GenWealth, operates as a DBA of Osaic—allowing me to serve you with greater flexibility, expanded solutions, and a continued commitment to thoughtful, relationship-driven guidance.

Enclosed you'll find my updated contact information. Should you reach out to my former Edward Jones office, they are required to provide you with my current contact details, which are also included on the Creative Financial Network business card provided.

I look forward to serving you with intention and care in this next chapter.

Warm regards,

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