



September 5, 2019

Exciting updates this summer!

Just wanted to share some highlights and personal updates with our Pacific Capital team:

- Cori Beth got married on the beautiful island of Maui in July.
- Amy and her husband bought their first home (close to our Corona office).
- Josh Coniglio (Certified Financial Planner) joined our Pacific Capital team as the Director of Financial Planning - we recruited him from a private wealth management team in Orange County. Josh replaced Nate, who recently welcomed their 5th child and moved to Idaho to be closer to his wife's family.
- Cori completed the courses and exams and earned the Wealth Management Specialist designation and the Certified Customer Service Professional designation.
- Amy completed the courses and exams and earned the the Certified Customer Experience Professional designation and also became a licensed California notary (Cori, Katie, and Amy are all CA notaries).
- Katie completed the courses and exams and earned the the Certified Customer Experience Professional designation.
- Josh also completed the courses and exams and earned the title of National Social Security Advisor.
- Our great interns finished up a productive summer of work for us and went back to USC and Indiana University.

We continue to enhance our expertise on your behalf. To those of you who are already Pacific Capital clients, we appreciate your trust and confidence in our team. You are the reason we enjoy our work. We will continue to strive to give you a Ritz-Carlton service experience with Fed-Ex efficiency!

If you'd like to discuss your own financial life and get a professional checkup done, schedule a brief Goals Conversation® with our team by visiting our [website](#) today - no cost or obligation involved. You may also click [HERE](#) for our google reviews.

