

Year End 2024



2024 | A Year in Review

As each year comes to a close, the thought of "what's next" often takes priority over what's most important: taking the time to reflect on the year that has passed. Here at Atlas, as we prepare for the New Year we know the value of looking back before we look forward.

Our team's commitment to service excellence and dedication to helping clients achieve their financial goals will continue far beyond the next year.

Join us as we look back and celebrate what we accomplished to better serve our clients in 2024.



Grand Openings

Excited to take ownership of the direction and future of our practice, we transitioned to be an independent entity under Wells Fargo Advisors Financial Network (WEAFN).

Our new offices were opened on April 8th.

(Left to right) Adam Bolick, Partner, Senior Financial Advisor
Jason Harris, Partner, Senior Financial Advisor
Christopher "Rusty" Knowles, Partner, Senior Financial Advisor
Marcy Bolick, Senior Registered Business Development Manager
Jessica Edwards, Senior Business Development Manager
Zach Edwards, Partner, Senior Financial Advisor



Wilmington, NC

1135 Military Cutoff Rd. Ste 201
Wilmington, NC 28405

910.834.6301

Greensboro, NC

7900 Triad Center Dr. Ste 360
Greensboro, NC 27409

743.230.2232



Our Client Service Team

One of our greatest achievements in 2024 is the creation and development of a multi-member team dedicated to providing exceptional customer service.

Our Client Service Team provides service to our clients and can assist you at either office location. From answering inquiries promptly to offering valuable guidance and support, our team goes above and beyond to help ensure that our clients receive the personalized attention they deserve.



Marcy Bolick marcy@atlasinvestmentmanagement.com

Senior Registered Business Development Manager

Trades | Marketing | Events | Client Experience | Community Engagement



Jessica Edwards jessica@atlasinvestmentmanagement.com

Senior Business Development Manager

Partnership Opportunities | Events | Marketing | Client Experience



Troy Sharpe troy@atlasinvestmentmanagement.com

Registered Operations Manager

Trades | Rollovers | New Account Opening | Qualified Charitable Contributions



Chris Neal chris@atlasinvestmentmanagement.com

Client Service Advocate

Scheduling | Account Updates | Beneficiary Changes

Check Requests/Money Transfers | Document Requests | Notary



Kristi Crowther kristi@atlasinvestmentmanagement.com

Client Service Advocate

Scheduling | Account Updates | Beneficiary Changes | Check Requests

Money Transfers Document Requests | Notary



Business Texting

We are pleased to let you know that business texting is now available as another way for us to connect when on the go. Thanks to new technology through Wells Fargo Advisors Financial Network, with your consent, we will be able to exchange business text messages. The types of business text messages you could receive might include appointment confirmations or reminders.

We are committed to communicating with you based on your preferences which is why, when you receive the first business text, you can either reply “yes” to enable texting capability or you can reply “stop” if you do not want to communicate with me through text messaging.

It is important to note that if you do approve texting, **you should not include any orders or requests for financial transactions in your text messages.** Atlas Investment Management of NEST Capital cannot accept these instructions via text messages and does not accept responsibility for their execution.

Contact Us to Enroll

Contact us through email to enroll in Business Texting with Atlas Investment Management. info@atlasinvestmentmanagement.com

New Texting Phone Numbers

Jason Harris , Partner, Senior Financial Advisor	910.713.1897
Christopher "Rusty" Knowles , Partner, Senior Financial Advisor	910.679.9339
Adam Bolick , Partner, Senior Financial Advisor	910.807.4590
Zach Edwards , Partner, Senior Financial Advisor	336.962.2146
Marcy Bolick , Senior Registered Business Development Manager	910.519.8960
Troy Sharpe , Registered Operations Manager	910.239.0823

**Please note that Business Texting is for client use only.
Prospective clients should call 910-834-6301.**

Check Out Our Website

We now have our own website!
Discover a wealth of knowledge at your fingertips.
Learn more about our services, discover wealth planning resources and access your account.

atlasinvestmentmanagement.com



Our Services

From investment planning to tax management strategies, learn how Atlas Investment Management can help you achieve your financial goals.

Provided Services:

- Investment Management
- Risk Management
- Legacy Planning
- Education Funding
- And More!



Online Resources

Explore online resources to help you learn more about investment planning such as a cash flow analysis and educational videos.

Available Resources:

- Investment Calculators
- Informational Videos
- Financial Glossary
- Financial Newsletter
- Tax Library



Access Your Account

Sign in to your Wells Fargo Advisors Financial Network account from our website. Gain access to your financial advisor and other helpful tools!

Why Access Your Account:

- Online Convenience
- Monitor Your Investments
- Real-time Account Information
- Convenient Services



Meet the Team

Get to know the Wilmington and Greensboro team who will be with you on your financial journey. Lasting and meaningful relationships are the foundation of our practice. You've worked hard for your money and should feel confident with your investment choices as you make decisions for your financial future. Send your advisor a message through our contact form to get started.

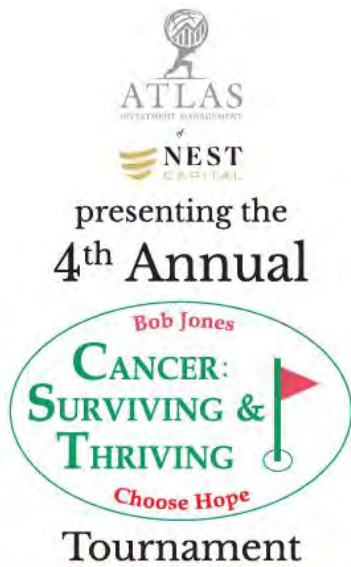


We strive to answer every call.

As our team pursued opening our independent offices, one of the most important changes we wanted to make was to aim to answer every call. Our five member service team strives to make sure your call is answered. Chris Neal and Kristi Crowther are often the first voice you hear when you call our office. If they are unavailable to take your call, Jessica Edwards, Marcy Bolick and Troy Sharpe are ready to assist you. That's not all - if our service team is in a meeting, our partners at NEST Capital have a team that strives to answer every call too.

Wilmington 910.834.6301 Greensboro 743.230.2232

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Dr. Andrew Peterson, MD, MPH and Bob Jones, 7 Year Cancer Survivor

A charity golf tournament created by the Bob Jones family and friends to support cancer survivor research at Duke University School of Medicine.

www.cancersurvivingthriving.org



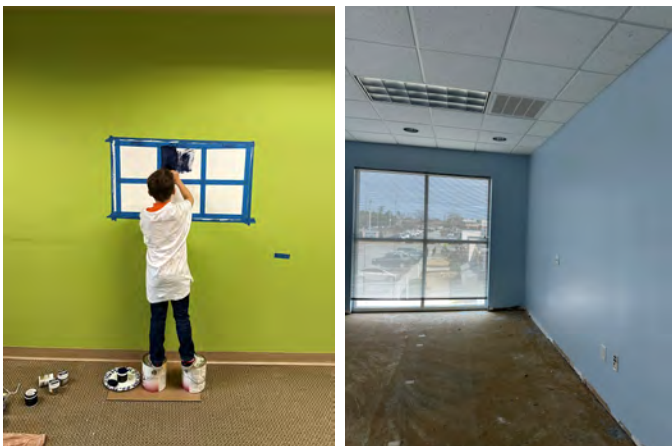
Increased Community Support

Our team has been proud to support the Cancer: Surviving and Thriving Golf Tournament, in Ocean Isle Beach each year since it began in 2021. The tournament was created by a client and his family to support cancer survivor research at Duke University School of Medicine. This event holds so much more meaning to us now, as we honor the life of our friend and client, the founder of this tournament who passed of cancer in 2022. This year we were honored to be presenting sponsors for the first time.

Building Better Spaces

Looking back on your year is necessary to see how seemingly small and insignificant improvements and innovations lead to great achievements over time.

Wilmington Office Conference Room Improvements



John Dungan Introducing Our First Intern

Everyone at Atlas is thrilled that John has joined our team. John's internship began in September and will wrap up in March of 2025.

John is completing his final year, as a Cameron School of Business student, at the University of North Carolina Wilmington. John's undergraduate concentration in Finance and Economics has provided him with foundational knowledge and a variety of business skills that are being practiced at Atlas. We are very excited about the work he is doing with our team!

ATLAS *of* NEST
INVESTMENT MANAGEMENT CAPITAL
NEWSLETTER

Year End '24



2025 | Looking Forward

2024 has been filled with incredible growth, and we have never been so excited about the future.

We would like to take this opportunity to express our sincere gratitude and say "thank you".

As we "look back" and "look forward", we are filled with appreciation for clients like you that make what we do so rewarding. Our team's commitment to service excellence and dedication to helping clients achieve their financial goals remains unwavering, and we look forward to working with you next year.

Thank you for placing your trust in us, as we aspire to help you bear the weight of the investment planning process.

Happy New Year!

Your Team at Atlas Investment Management of Nest Capital