

The

# MERRITT POINT MINUTE

GUIDING CLIENTS THROUGH THE COMPLEXITIES OF WEALTH MANAGEMENT



January, 2025

## MERRITT POINT'S YEAR-END CORPORATE MEETING & HOLIDAY PARTY



Thank you to our team and partners for gathering together to reflect on and celebrate this year's achievements at our annual corporate meeting and holiday party.

Here's to even more success in 2025!

### UPCOMING NYSE HOLIDAYS

\*Please be advised that our offices will be closed in observance of the following market holidays:

**Martin Luther King Jr. Day**  
Monday, January 20th

**Presidents' Day**  
Monday, February 17th

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# Economic Commentary

Coming off of a strong 2024 for equity markets we prepare for 2025 with our eye on tariffs, interest rates and inflation as potential headwinds for the market. Our focus has been on owning quality positions in both equities and fixed income. In November, high-yield-spreads sat at 2.88. We experienced one of the lowest risk premiums we've seen in high yield space. With high yield markets well priced, we believe there is not much upside. For this reason we decreased our high yield exposure in our Merritt Point Asset Allocation Portfolios. We prefer multi sector in this market to allow the specific managers the ability to allocate money to sectors they feel are most worthwhile, and our current fixed income managers have been moving up in quality within their funds. We also executed some changes to our preferred stock holdings. Moving from low duration preferred to more average duration preferred fund that excels in blending 25k and 100k (institutional) preferreds. As we assess the portfolios this month, we expect to continue our focus on quality names and managers and also expect to increase our exposure to liquid alternatives given the appreciation we've seen in equities recently and the risks to fixed income if rates remain higher for longer.



**Ross Bauer**  
Founder, COO

## TEAM BIRTHDAYS



**Michael A Salimbene**  
Director, Partner, Wealth Advisor  
Senior PIM Portfolio Manager  
January 2nd



**Samantha Belport**  
Senior Associate  
January 3rd



**Anthony D'Ambrosio**  
Director, Partner, Wealth Advisor  
PIM Portfolio Manager  
January 13th



**Ingrid Dikmen**  
Senior Vice President - Investments  
Senior PIM Portfolio Manager  
February 25th



**Jenna Signorile**  
Associate  
March 7th

## ANNIVERSARIES

Celebrating anniversaries this upcoming quarter are:



**Jason Andrews, CRPC®**  
Founder, CEO  
6 Years



**Ross Bauer**  
Founder, COO  
6 Years



**Beth Cutler**  
Founder, President  
6 Years

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# ANNIVERSARIES

(continued)



**Dee Lawrence**  
Vice President  
4 Years



**Matthew Muzyka**  
Senior Associate  
4 Years



**Larry Baker**  
Senior Vice President  
3 Years



**Kate Welch**  
Senior Associate  
3 Years



**Ted Youngling**  
First Vice President - Investments  
2 Years



**David Belport, MBA, CIMA®**  
Managing Director - Investments  
Senior PIM Portfolio Manager  
2 Years



**Samantha Belport**  
Senior Associate  
2 Years



**Steve Belport**  
Senior Vice President - Investments  
2 Years

# Year in Review: Awards and Recognition

## 2025 Forbes Best in State Wealth Management Teams



2025 Forbes Best-in-State Wealth Management Teams: Awarded January 2025; Data compiled by SHOOK Research LLC based on the time period from 3/31/23 - 3/31/24 (Source: Forbes.com). The Forbes Best-in-State Wealth Management Teams rating algorithm is based on the previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria. 11,674 wealth management teams were considered for the rating; 5,331 (45.66% percent of candidates) were named 2025 Forbes Best-in-State Wealth Management Teams.

## AdvisorHub Advisors to Watch over \$1B 2024



2024 AdvisorHub Advisors to Watch: Awarded June 2024; Data compiled by AdvisorHub based on the time period from 12/31/22 - 12/31/23 (Source: AdvisorHub). The AdvisorHub 2024 Advisors to Watch (A2W) rating produced by AdvisorsHub is based on industry experience, assets under management, revenue, growth, compliance records, professionalism, and other criteria. Investment performance is not a criterion. Self-completed survey was used for rating. A2W winners are redefined into subcategories and then ranked with the subcategory based on scale, growth and professionalism. The rating and ranking are not related to the quality of the investment advice and based solely on the disclosed criteria. Being placed on the subcategory does not denote an additional award. 1987 wealth managers were considered for the award; 1000 (50.3% percent of candidates) were named 2024 AdvisorHub Advisors to Watch.

Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC (WFAFN), Member SIPC. Merritt Point Wealth Advisors is a separate entity of WFAFN.

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# Year in Review: Awards and Recognition

(Continued)

## 2024 Forbes Top Next-Gen Wealth Advisors Best In State Ross Bauer, Founder, COO



2024 Forbes Top Next-Gen Wealth Advisors Best-In-State: Awarded August 2024; Data compiled by SHOOK Research LLC based on the time period from 3/31/23 - 3/31/24 (Source: [Forbes.com](https://www.forbes.com)). The Forbes Top Next-Gen Wealth Advisors Best-in-State rating algorithm is based on the previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

## ANNIVERSARIES

(continued)



**Dan Dodderidge, RICP®**  
Senior Associate  
2 Years



**Andrew Pillarella**  
Vice President - Investments  
1 Year



**Roberta Anderson, CFP®**  
Vice President - Investments  
1 Year

## Forbes Top Women, Wealth Advisors Best in State CT 2024 Beth Cutler, Founder, President



Source: [Forbes.com](https://www.forbes.com) (Awarded February 2024) Data compiled by SHOOK Research LLC based on the time period from 9/30/22 9/30/23. Fee paid for use of marketing materials. The Forbes Top Women Wealth Advisors Best in State rating algorithm is based on the previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC. Investment performance is not a criterion. Self completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

# Our Annual Food Drive

This holiday season, our team at Merritt Point Wealth Advisors collected donations for the Food Bank of Lower Fairfield County.

Upon our drop off at the food bank, our donations weighed in at approximately 260 pounds, surpassing our total from last year.

Sending a special thank you to all of our team members for their generous donations and constant support!



## A MESSAGE FROM OUR CEO



**Jason Andrews, CRPC®**  
Founder, CEO

Dear Clients,

As we say goodbye to 2024, I reflect on a milestone year for Merritt Point. This year, we've welcomed new advisors and team members, expanded our services and locations, and celebrated the ongoing success of our firm and our clients.

Looking to 2025, we're excited for the continued growth and momentum ahead. Merritt Point will keep evolving, developing and refining the essential tools and resources that support our clients' success in every aspect of financial planning.

Thank you for your trust, partnership, and for being an integral part of our journey. Wishing you a safe and inspiring start to 2025!

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