Rinehart Wealth Management
Greater Trust

In our continuing efforts to communicate news about our firm and its activities, this month we will address our associates' roles and responsibilities. The manner in which our associates work together allows us to bring the highest level of service and expertise to our clients. This teamwork among associates with different areas of expertise is what makes our firm unique among other small, boutique investment advisors.

To begin, it is with great pleasure that I announce the arrival of our newest Portfolio Manager, Daniele Donahoe. Daniele comes to us from the Columbia Management Group, where she co-managed the Columbia Small Cap Growth II fund. A CFA charterholder and a graduate of the University of North Carolina at Chapel Hill, she has spent her entire career in equity research working at Salomon Smith Barney, Thomas Weisel Partners and J.C. Bradford. We are thrilled to welcome her to our team and hope that you have the opportunity to meet her soon.

The nature in which Daniele, over time, will become directly included in managing individual client portfolios is a reflection of our commitment to a team approach. While the Financial Advisor plays the primary role in supporting the client, the Portfolio Manager and Financial Planner are key to each client relationship as well. No less important to the overall relationship are the members of our Client Services Team who fulfill the administrative and transactional needs of our clients and play a crucial role in our success.

This team approach sets us apart from other small firms that require a few people to wear multiple hats. By including in each client relationship associates who have investment and planning subject matter expertise, we can provide a higher level of attention to these areas. This multi-individual approach also provides a diversity of perspectives to each client's situation. Offering a wide range of services and investments without losing the uniqueness that comes with being a smaller firm is a delicate balance, one we think our current staff has achieved with its approach to managing client relationships.

While proud of what we have achieved in the past 25 years, we are always looking for ways to improve; we know it is a competitive marketplace and it is critical that we continue to raise the bar by which we are measured. We want to encourage your feedback regarding how we might better serve your needs. We would also ask that you keep us in mind if a friend or colleague inquires about wealth management needs they might have.

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