



Pinnacle View Wealth Management Q1 Newsletter 2025

We are pleased to present our quarterly newsletter to you.

This month's team member spotlight is on one of the newer members to join our team, Wealth Management Associate and Chartered Retirement Planning Counselor (CRPC®) **David Seay**! Further inside, you'll also find a few insights to prepare for the new year ahead. If you have any questions, don't hesitate to reach out to the team.

Team Spotlight: David Seay CRPC®

My Role on the Team: *Wealth Management Associate, Chartered Retirement Planning Counselor*

As a Wealth Management Associate, my role focuses on the service and support side of our team, ensuring clients receive a seamless and personalized experience. With over 15 years of experience in the financial services industry, I bring a deep understanding of client needs and operational experience. I take pride in onboarding new clients, implementing tailored investment strategies, executing trades, and account administration.



What makes you passionate about work?

What inspires me most about my job is the opportunity to build meaningful relationships and provide thoughtful service that helps clients feel confident and secure about their financial futures. I'm driven by the trust clients place in me to support them in navigating complex financial decisions. It's incredibly rewarding to know that through my work, I can help people achieve their financial goals and bring them peace of mind. The ability to serve and empower others through personalized care and attention is what motivates me every day.

Life outside of the office:

I live alone with my black lab, Tyson, who keeps me company and adds a lot of joy to my life. I value spending quality time with my friends and family, whether it's gathering for special occasions or simply catching up. In my free time, I enjoy watching Mixed Martial Arts, which combines my interest in sports and strategy. I also love to travel and explore new places, especially when it involves discovering unique restaurants and trying different cuisines.

Hobbies & Interests

One of my favorite hobbies outside the office is playing poker. I enjoy it because it combines strategy, psychology, and decision-making. Poker challenges me to think critically, read situations and people, and make calculated decisions under pressure. Plus, it's a great way to connect with others and unwind while sharpening my mind. The mix of fun, competition, and strategic thinking is what makes it so enjoyable for me.



One of my personal values is giving back to the community and helping those in need. I've had the privilege of volunteering with Feed My Starving Children, an organization dedicated to providing nutritious meals to children in impoverished areas around the world. This experience has been deeply meaningful to me, as it aligns with my belief in making a positive impact on others' lives.

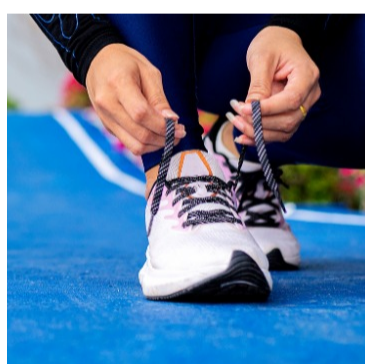
New Year Insights & Resources



Financial Literacy for Any Stage of Your Life

Financial literacy means being equipped with the knowledge to help make smart financial decisions during every stage of your life. No matter your current priorities, a strong financial literacy foundation can help you meet your goals.

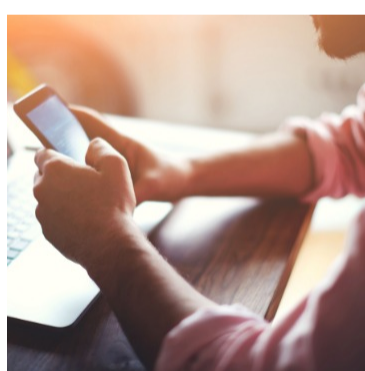
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6 Financially Smart Ways to Start 2025

Heading into 2025, it's time to take stock of your budget, debt and investments—and check them against your financial goals. These six steps can get you started.

[Read More](#)



Maximum Benefit and Contribution Limits for 2025

The IRS has increased contribution limits for 2025. Click below for a detailed list of all the new contribution limits.

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