

# Happy Holidays

from the

## STONEBRIDGE FAMILY

Dear Clients, Advisors, Family, and Friends,

DECEMBER 2023

The holiday season brings forward a more purposeful time for deeper reflection and a spirit of thankfulness. The Stonebridge Family is truly grateful for the trust you have placed in us and the relationships we have with you. Through our growth, Stonebridge works together in all facets with one goal, YOU are always the central focus of the services we provide. We continue striving to serve you better with improved analytical tools, expanded investment solutions, building efficiencies in processes, providing timely communications, all for an optimal client experience.

Within our emails, website publications, and in-person communications, we have provided increased market updates, industry trends, Stonebridge perspectives, and highlighted the exciting, ongoing team expansion at Stonebridge. We continue to invest heavily in our ability to customize client investment portfolios to meet your individual needs, making improvements to our proprietary portfolio management system (Stonebridge Analytics).

As of December 15, 2023, we are proud to have reached \$2 billion in firm assets under management! We are also excited to have celebrated the 10-year anniversary of The Covered Bridge Fund in October! While our strategic solutions have expanded, our fundamental investment principles have remained steadfast.

Stonebridge continues to be active and impactful in our community, participating with both local and national nonprofit organizations. For our, 2024-2026 Community Partnership Program pledge, Stonebridge Capital Advisors is proud to partner with Open Arms of Minnesota - a local nonprofit organization whose mission is "By providing food as medicine, we nourish our clients and build community." As part of our partnership pledge, we will continue working with our previous community partners and supporting their visions and efforts.

The Stonebridge Family has many things to be thankful for, but we are especially grateful for you. May this holiday season bring you and your families comfort, joy, and a prosperous New Year!

### 2023 RECOGNITIONS AT A GLANCE

- Better Business Bureau Torch Award for Ethics Finalist
- Minneapolis Regional Chamber of Commerce Wellness Champion
- John Schonberg awarded Twin Cities Notable Leader in Banking & Finance
- Robert Kincade awarded Five Star Wealth Manager
- Patrick Kincade nominated for MN Changemakers Award
- MN Keystone Company 5-year Member



**Robert Kincade**  
President & CEO

**Heidi Hukriede, CFA**  
Chief Operating Officer

**Lory Wessel**  
Chief Administrative Officer

**John Schonberg, CFA**  
Chief Investment Officer

**Ronald Hume**  
Executive Vice President