EXCITING UPDATES FOR 2023!

Shorepoint Capital Partners, LLC ("Shorepoint") is pleased to announce that Burns & Levinson Asset Management has hired Shorepoint to be their primary sub-advisor for their clients. Shorepoint will develop and implement an investment strategy that befits each client and will advise on retirement, insurance, financial and estate planning. Shorepoint continues to be guided by the same philosophy we have held dear since our founding almost 14 years ago in the aftermath of the Great Recession – providing independent advice that puts clients and their needs first, and a true team approach to wealth management.

We are also happy to announce that Rand Folta, CFA has joined Shorepoint as a portfolio manager. Rand has over forty years' experience in the investment industry in both the institutional and private client segments. He was most recently Chief Investment Strategist for Winslow, Evans and Crocker. Prior to that, he was Chief Investment Officer at Burns & Levinson Asset Management and Equity Portfolio Manager for National Grange Mutual Insurance Company. He earned a B.S. in Investments and Economics from Babson College and a M.S. in Finance from Boston College.

Shorepoint Capital Partners, LLC is an independent, fee-only registered investment advisor with the U.S. Securities and Exchange Commission based in Norwood, MA, and was founded by Tim Vanech and Luis Raposo, CFA. It serves as a fiduciary, acting in its clients' best interest providing investment advice and financial planning on over $630 million in assets.

B&L Asset Management LLC D/B/A Burns & Levinson Asset Management LLC (the "Company") is a Boston-based registered investment advisor with the U.S. Securities and Exchange Commission. The Company is affiliated with Burns & Levinson LLP, a law firm, but does not provide legal services.

Regards,
The Shorepoint Team

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Shorepoint
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