The Hasenberg Hartsock Group
Merrill Lynch Wealth Management
1152 15th Street, NW, Washington, DC 20005
www.fa.ml.com/thhg

Professional Experience

We strive to be one of the premier financial advisory teams for doctors in the Greater Washington area.

Many medical professionals, their families and their employees depend on our experienced advisors for help on a broad range of services, including:

• Retirement plans
• Investing and wealth management strategies
• Financial planning
• Insurance strategies
• Support with practice mergers and buyouts

John Hasenberg, AAMS®, CPFA, CRPC®
Senior Vice President
Senior Financial Advisor
202.659.7428
john.hasenberg@ml.com

Andrew Sheridan, CFP®, CPFA
Assistant Vice President
Senior Financial Advisor
202.659.6034
andrew.j.sheridan@ml.com

Tonia Lee
Financial Advisor
202.659.7462
tonia.lee@ml.com

Gabriela Guardia
Wealth Management Associate
202.659.5482
gabriela.guardia@ml.com

Nancy Hartsock, CRPC®
First Vice President
Senior Consultant
202.659.5490
nancy.hartsock@ml.com

Moe Elhag
Financial Advisor
Senior Portfolio Advisor
202.659.7272
mohanad.elhag@ml.com

Nicole Floyd
Financial Advisor
202.659.6130
nfloyd@ml.com

Patrick Cashmere
Wealth Management Client Associate
202.659.7353
patrick.cashmere@ml.com

Merrill Lynch, Pierce, Fenner & Smith Incorporated (also referred to as “MLPF&S” or “Merrill”) makes available certain investment products sponsored, managed, distributed or provided by companies that are affiliates of Bank of America Corporation (“BofA Corp.”). MLPF&S is a registered broker-dealer, registered investment adviser, Member SIPC and a wholly owned subsidiary of BofA Corp.

Trust and fiduciary services are provided by Bank of America, N.A., Member FDIC. Insurance and annuity products are offered through Merrill Lynch Life Agency Inc. (“MLLA”), a licensed insurance agency. Bank of America, N.A., and MLLA are wholly owned subsidiaries of BofA Corp.

Banking, mortgage and home equity products are offered by Bank of America, N.A., and affiliated banks, Members FDIC and wholly owned subsidiaries of BofA Corp.

Equal Housing Lender. Credit and collateral are subject to approval. Terms and conditions apply. This is not a commitment to lend. Programs, rates, terms and conditions are subject to change without notice.

Investment products offered through MLPF&S and insurance and annuity products offered through MLLA:

<table>
<thead>
<tr>
<th>Are Not FDIC Insured</th>
<th>Are Not Bank Guaranteed</th>
<th>May Lose Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are Not Deposits</td>
<td>Are Not Insured by Any Federal Government Agency</td>
<td>Are Not a Condition to Any Banking Service or Activity</td>
</tr>
</tbody>
</table>
Offering you access to the investing insights of Merrill and the banking convenience of Bank of America to help you pursue your goals

Upsizing, downsizing or buying a vacation home
- Home Loans
- Home Equity Lines of Credit
- Securities-Based Lending
- Credit Cards

Volunteering, mentoring others and giving to charities
- Donor-Advised Funds
- Private Foundations
- Charitable Trusts

Spending your free time in meaningful ways
- Credit Cards
- Securities-Based Lending
- Custom Lending

Planning for health care expenses now and in the future
- Long-term Care Insurance
- Health Savings Account
- Disability Insurance

Working in retirement, selling or starting a business
- Bank of America Business Banking
- Exchange Funds
- Concentrated Stock Management
- Succession Planning

Using your finances to bring it all together
- Bank of America Checking and Savings Accounts
- Credit Cards
- Online Account Access
- Merrill Investment Accounts
- Investment Advisory Accounts
- Alternative Investments
- Impact Portfolios
- Market-Linked Investments
- Securities-Based Lending
- Margin
- Home Loans
- Exchange-Traded Funds
- Mutual Funds
- Closed-end funds
- Fixed-Income Products
- Options
- Annuities

Taking care of your family and other people in your life
- Trust & Estate Services
- Education Funding Strategies
- Insurance

Investing involves risk, including loss of principal.
Merrill, its affiliates and financial advisors do not provide legal, tax or accounting advice. You should consult your legal and/or tax advisors before making any financial decisions.
This material does not take into account a client’s particular investment objectives, financial situations or needs and is not intended as a recommendation, offer or solicitation for the purchase or sale of any security or investment strategy. Merrill offers a broad range of brokerage, investment advisory and other services. There are important differences between brokerage and investment advisory services, including the type of advice and assistance provided, the fees charged, and the rights and obligations of the parties. It is important to understand the differences, particularly when determining which service or services to select. For more information about these services and their differences, speak with your Merrill financial advisor.

Accredited Asset Management SpecialistSM, AAMS®, and the AAMS® logo are service marks of The College for Financial Planning Institutes Corp. Professionals who successfully complete the professional designation program requirements, comply with professional conduct standards, and complete the ongoing renewal requirements will be granted authorization by the College to use the following certification marks: Accredited Asset Management Specialist™, AAMS™, and the AAMS™ logo. Chartered Retirement Planning Counselor™, CRPC®, and the CRPC® logo are service marks of The College for Financial Planning Institutes Corp. Professionals who successfully complete the professional designation program requirements, comply with professional conduct standards, and complete the ongoing renewal requirements will be granted authorization by the College to use the following certification marks: Chartered Retirement Planning Counselor™, CRPC®, and the CRPC® logo. Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with plaque design) logo in the United States, which it authorizes use of by individuals who successfully complete CFP Board’s initial and ongoing certification requirements.
A Senior Portfolio Advisor can help clients pursue their objectives by managing on a discretionary basis custom investment strategies, selecting from a wide range of Merrill model portfolios and third-party investment strategies.
The Bull Symbol and Merrill are registered trademarks of Bank of America Corporation.

© 2021 Bank of America Corporation. All rights reserved. | MAP3649017 | MLWM-248-FS | 07/2021
Made with 10% recovered fiber content. By using recovered fiber content, Bank of America is helping to reduce greenhouse gas emissions and water consumption. Leaf icon is a registered trademark of Bank of America Corporation.