

CAPITAL VIEW INVESTMENT GROUP

Advisors with D.A. Davidson & Co. member SIPC



Quarterly Newsletter

D|A|DAVIDSON

Team Update: Farewell to Renee & Welcome to Krupa

Happy Spring! It's hard to believe the first quarter of 2025 is already behind us, but we hope you are enjoying the changing seasons and the revitalization that spring brings with it. Beyond the weather starting to turn, we have also had some changes with the Capital View Investment Group team that we wanted to make you aware of.

Farewell to Renee

Our longtime friend and Client Associate, Renee Chase, retired from D.A. Davidson on January 31, 2025 after 10 years of invaluable service.

She worked as the Senior Client Associate for our team: first called the Hansen Investment Group, and now known as the Capital View Investment Group. She started her career in 1992 at Fidelity Investments, then moved to Dain Rauscher. In 1995 she changed focus and worked in the Human Resources field for 20 years. After 15 years at the University of Utah, she returned to the financial services industry and joined D.A. Davidson. While at the firm, she participated in the Client Associate roundtable, was the Utah branches Volunteer Champion, and contributed to the success of her Chairman's Council Financial Advisors.

She spends her free time volunteering in the Salt Lake City community with Volunteers of America, Leukemia & Lymphoma Society, and Make a Wish Foundation.

She will spend her retirement with her husband Hugh - golfing, skiing, traveling, and taking care of their new grandson. She is thrilled for that opportunity and looks forward to this new chapter in her life.

We will miss her energetic spirit and relentless ability to conquer any task given to her – but wish her the very best as she enters this new and exciting stage of retirement.

Welcome to Krupa

Please join us in offering a warm welcome to our new Client Associate, Krupa Sukaveneshvar. Krupa joined D.A. Davidson in late 2024, providing the opportunity for her and Renee to work together during this time of transition.

Prior to joining D.A. Davidson, Krupa worked at Goldman Sachs as a Private Wealth Management Associate. She started her career with Goldman Sachs in the Salt Lake City office as a Control and Risk Management Analyst working with the Private Wealth Management divisions in Europe and Asia. She led various regulatory reporting projects in the London and Salt Lake City offices and was promoted to being a Technical Specialist. She transitioned to the Private Wealth division in Chicago as a Wealth Management Representative working with established financial advisors whose assets under management exceeded \$3.5 Billion, and helped new advisors grow their book of business.

Krupa has a Bachelor's Degree in Economics from India and a Master of Business Administration (MBA) from the University of Utah in Salt Lake City.

In her free time, Krupa loves gardening, traveling, hiking, and enjoying the outdoors with her husband, son and daughter.

Krupa is well-poised to continue offering the same kind of extraordinary service that you have come to expect from our team. We are excited for you to get to know her and are confident you will find her a pleasure to work with.

Market Comment

If you watch the markets, you know the beginning of 2025 has been a bit bumpy. While much of the buzz has been around the implementation of tariffs, we would also highlight that the last two calendar years have been quite positive for the markets. Toward the end of 2024, the market was starting to get a bit overvalued and was in many ways due for a pullback. While we would never pretend to be able to predict what may happen in the next 12-24 months, we remain confident in the resilience of the market long-term and are committed to managing your portfolio accordingly. Thank you for your continued trust and partnership.

Best Regards, Mark, Brad T., Drew, Brad H., Krupa & Erin

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