NEWS

For Immediate Release

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CARDINAL
RETIREMENT PLANNING, INC.

Cardinal Retirement Planning, Inc. Announces New Hire, Promotions as Company Growth Continues

North Carolina Firm Serves Ever-Growing, Discerning Clientele

CHAPEL HILL AND DURHAM, NC, (JUNE 16, 2022) – Cardinal Retirement Planning, Inc., (Cardinal) a registered investment advisory firm domiciled in North Carolina serving discerning clients from the West Coast to East Coast, recently announced a new hire and multiple promotions as it continues to implement its proprietary asset allocation software, which combines machine learning and artificial intelligence with financial and tax planning expertise.

1. **Anessa Custovic, PhD**, has moved into the role of Chief Investment Officer previously held by Mike Aguilar, PhD, who decided to return to academia. Although no longer with Cardinal, Dr. Aguilar will continue joint financial econometric research with Dr. Custovic that promotes a more robust approach to portfolio construction and asset allocation. Dr. Custovic's detailed understanding of economics and quantitative analysis gives her a unique lens and perspective as she oversees the firm's investment models, leads research projects, and serves clients at Cardinal.

2. **Jacob Yocco, CFP®**, formerly a staff planner at the firm, has been promoted to Director of Financial Planning. He will focus on all facets of advising using his education as a CERTIFIED FINANCIAL PLANNER™ practitioner and his experience as a financial professional serving retirees. Combining these strengths with his depth of knowledge on Medicare and health insurance will help Cardinal clients achieve their financial goals and manage their risk.

3. **Erica Patella** earned the Director of Operations position by combining her passion to grow and develop teams with her experience as a seasoned financial services professional in the senior markets insurance industry. She is now managing the day-to-day operations of Cardinal and helps implement more efficient policies and procedures.

4. Cardinal also welcomed **Christiana Amis** to the firm as an Operations Coordinator. Her experience in the administration and operation of financial services firms is foundational to the firm's ongoing professionalism and success.

"It's well-understood that financial advising is part science and part art, but too often passion is a missing ingredient. These team members' passion and expertise are essential to Cardinal Retirement Planning's overall ability to deliver high-quality service for all of our clientele," said President and CEO Doug "Buddy" Amis, CFP®. "I couldn't ask for a more dedicated and talented team."

ABOUT CARDINAL RETIREMENT, INC.

Cardinal Retirement Planning, Inc., (Cardinal) is an independent, fee-based wealth management firm based in Chapel Hill and Durham, North Carolina. At Cardinal, life is not a mathematical equation and people are not treated like numbers. Cardinal's recommendations apply financial planning principles and cite tax code while also incorporating practical, real life solutions that are unique to the needs of each client. As investment advisor representatives, Cardinal's advisors work as fiduciaries; this means that the Cardinal team of advisors places client needs first, and conflicts of interest are shared and mitigated. There is no sales pitch. There are no smoke and mirrors. Client goals become Cardinal's goals. The Cardinal team provides one-time and ongoing financial planning and consulting services, portfolio management, and econometric consulting to its clients. Cardinal's proprietary portfolio allocation software, PADME, allows the team to analyze and allocate all types of assets and investments, including stocks, bonds, mutual funds, real estate, and alternatives. Cardinal works primarily with pre-retirees and retirees in addition to high-net-worth clients, businesses, and non-profits that often have non-retirement goals. Cardinal helps its clients in many areas, including cash flow strategy, retirement planning, tax planning, estate planning, insurance reviews, alternative assets, and college planning. To learn more about Cardinal Retirement Planning, Inc., please visit: www.PlanWithCardinal.com

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