Subject: Premier Insider August 2026

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Premier Insider

Are You Taking Advantage of the Branch Resources Page?

If it's been a while since you've visited the password-protected **Branch Resources** section of the Premier Network website, it's worth taking another look.

One of the goals we've had over the past year is to build a library of resources you can access whenever they're helpful, not just when you happen to be available for a live webinar.

The page includes recordings of all of our educational webinars, along with every quarterly compliance update presented by Kristina. Whether you missed a session or just want to revisit a topic, everything is there when you need it.

One Recording That's Well Worth Your Time...

If I could recommend just one webinar to watch, it would be:

From Meeting Notes to CLIC—Automatically

Matt Den Hartog from Cambridge's Practice Management team walks through how AI, CLIC, and your CRM can work together to simplify your day-to-day workflow.

He demonstrates how integrations with **Redtail and Wealthbox** can:

- Capture meeting notes automatically.
- Organize and structure client information.
- Push information directly into CLIC and CLIC Advisor.
- Eliminate duplicate, and sometimes even triplicate, data entry between your meeting notes, CRM, and other systems.
- Create cleaner workflows and better follow-through.

What I liked most about this presentation is that it isn't about chasing the latest AI trend. It's about practical tools that are available today and how they can make your office run more efficiently.

I also think many advisors would be surprised by how much technology is already available to them. There are automation tools and integrations that can eliminate a lot of manual entry, but many people simply don't know they exist or haven't had the time to explore them. Sometimes the biggest productivity gains don't come from buying something new. They come from getting more out of the technology you already have.

We're using several of these tools in our own office, and we can honestly say they've become incredibly valuable. They've helped us reduce manual entry, improve consistency, and save a significant amount of time. That's why I feel comfortable recommending this webinar. It's not just interesting. It offers practical ideas you can put to work in your own practice.

The recording is only about **50 minutes**, and I truly think it's time well spent. If you missed the live presentation, I encourage you to carve out an hour to watch it. My guess is you'll come away with at least one or two ideas that will make your office run a little more efficiently.

We'll continue adding new educational content and compliance updates to the Branch Resources page throughout the year, so be sure to check back from time to time. Hopefully you'll find something that helps you spend less time on administrative work and more time doing what you do best: serving your clients.

ADVISOR SPOTLIGHT
Anneliese D'Souza

In this edition of our Advisor Spotlight series, we are proud to feature Anneliese D'Souza. Anneliese has built her practice around a simple but powerful principle: always do what is best for the client. Her commitment to integrity, education, and service has earned the trust of the families she serves, many of whom have remained with her for generations. She approaches every relationship with genuine care, unwavering ethics, and a belief that financial guidance should be accessible to anyone seeking a better future. We are grateful to have Anneliese in our branch and proud to support the work she does for her clients every day.

Individualism and equal opportunity are at the heart of how I serve clients. I firmly believe in client autonomy and that clients should determine their own financial destination. I also believe that every individual has the opportunity to succeed and, when given the right guidance and support, can achieve financial success.

Client satisfaction and success are the benchmarks I use to measure my own success. I strive to uphold the highest standards of service because I genuinely value the relationships I build with my clients, sometimes over three generations.

I believe in "service above self." I make every effort to engage, educate, and empower clients. When clients understand the "why" behind financial decisions, they feel more confident, informed, and involved in the process. This approach helps build trust and long-lasting relationships.

Growing up, my family experienced financial challenges. Those experiences inspired me to pursue a career that would allow me to help families and individuals achieve financial stability. As a Chartered Accountant (ACA) in India, equivalent to a CPA, I was able to fulfill part of that mission. However, after immigrating to the United States, I realized that personal financial planning required a separate focus beyond accounting, taxation, and auditing. My early life experiences ultimately became the catalyst for becoming a Financial Advisor.

My personal experiences taught me that a person's financial situation does not define who they are. With the right guidance and planning, everyone has the opportunity to succeed. That is why financial planning remains my primary focus. I firmly believe that, when done correctly, a financial plan serves as the blueprint for long-term success.

Client education is essential to success. Too often, financial professionals tell clients what to do without explaining why they should do it. Clients appreciate the time and effort taken to educate them, and when they understand the reasoning behind recommendations, it helps them feel more confident and engaged in the process.

While our industry continues to evolve, that commitment to education remains as important as ever. I am closely watching the growing role of artificial intelligence and the impact it will continue to have on the financial services industry. Technology will continue to change how information is delivered, but helping clients understand their options and make informed decisions will always be at the center of my work.

Many people believe they need substantial assets to work with a Financial Advisor. I work hard to correct that misconception. From the very first meeting, I emphasize that my focus is on financial planning and that clients do not need significant assets to benefit from professional guidance.

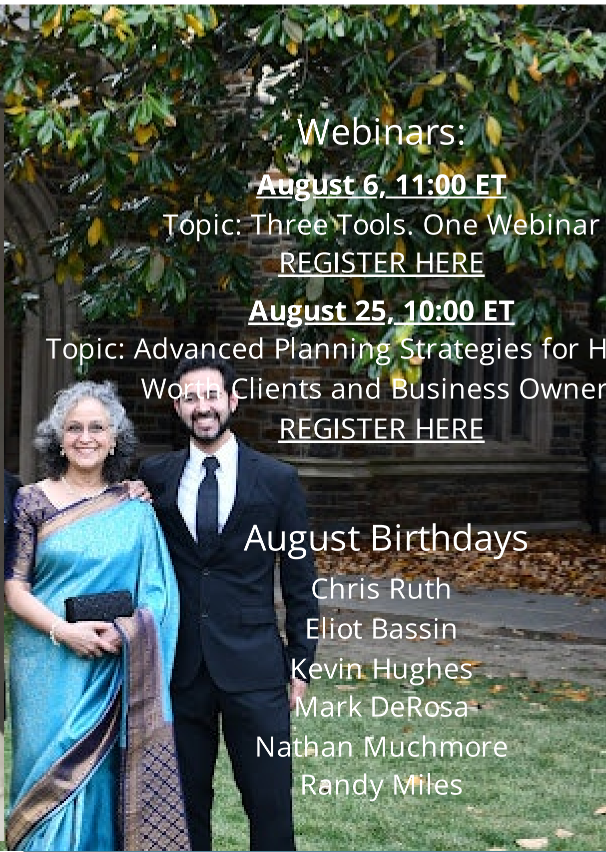
Nothing is more rewarding than seeing clients achieve their financial goals and retire with peace of mind. That outcome is not reserved for a select few. With a sound plan, education, and commitment, I believe everyone deserves the opportunity to work toward financial success.

My business philosophy is reflected in Mark 8:36: “For what does it profit a man to gain the whole world and forfeit his soul?” This philosophy keeps me grounded and has guided many of the decisions I have made throughout my career.

Transitioning from a salaried position to business ownership is never easy, but Cambridge Investment Research, Inc./Premier Wealth Management, Inc.™ made that transition seamless for me. In 2004, I approached Cambridge without an established client base and made it clear that I would not take clients from the firm where I had served as a key employee. Of all the firms I spoke with, Cambridge/Premier Wealth Management, Inc.™ were the only ones that emphasized integrity over commissions and respected the principles that mattered to me.

Bob, Traci, and the entire team at Premier Wealth Management, Inc.™ have consistently supported my mission of serving clients the right way. I remain grateful for the collaborative culture, experienced advisors, and unwavering commitment to doing what is best for clients.

My faith and family have been the strongest influences in shaping who I am, both personally and professionally.



Anneleise and her family outside Duke chapel, from left to right, elder son Darren, husband Mansuet, and far right is youngest son, Erron.

He's baaaaack! Caden Collins was our intern last year. He's now officially part of the Premier team full-time! Caden was hired in June as an Operations Associate and works closely with Josh Cesare. Welcome to the team Caden!

TEAM NEWS

The “Attitude Is Everything” T-Shirt Design Contest featuring student artists from Plainview-Old Bethpage JFK High School, results are in!

The recipients of the inaugural 2026 Attitude Student Design Scholarship: Plainview-Old Bethpage JFK High School seniors Tiffany Weng and Hriti Sanghvi (shown above with Bryan Trugman, Ms. Rosemarie Elder {art teacher}, and Dr. Ben Wiley {Assistant Principal}.

Their designs were selected from a talented group of student submissions inspired by the theme “Attitude Is Everything.” The result? Thoughtful, creative, and inspiring artwork that reflected resilience, confidence, optimism,

Webinars:

August 6, 11:00 ET

Topic: Three Tools. One Webinar

REGISTER HERE

August 25, 10:00 ET

Topic: Advanced Planning Strategies for High-Net-Worth Clients and Business Owners

REGISTER HERE

August Birthdays

Chris Ruth
Eliot Bassin
Kevin Hughes
Mark DeRosa
Nathan Muchmore
Randy Miles

Industry Information

Executive Presence: What Clients Notice Before They Trust Your Advice

Two Conversations Every Advisor Should Have With Their Clients’ Kids and How To Start Them

Why Tax Planning Strategies Should Be Central to Your Advisory Practice

Friendly Reminders

Enhanced Identity Authentication Process - Cambridge is implementing an enhanced identity authentication process to better protect your information and strengthen account security. We know these additional verification steps can sometimes feel like one more hurdle, but unfortunately they're becoming a necessary part of doing business in today's cybersecurity environment. Please take a few minutes to REVIEW THIS BULLETIN so you know what to expect when interacting with the Home Office.

Did You Know? Cambridge Home Office has expanded its service hours to give advisors more flexibility when they need assistance. If you've ever found yourself wishing you could reach someone a little earlier or later in the day, this update is worth a look. Take a minute to review determination, and the many ways attitude shapes our lives.

Created by Attitude Financial Advisors, the Attitude Student Design Scholarship celebrates both creativity and a simple belief that guides our firm: while we can't control every circumstance, we can control our attitude, how we respond, and how we choose to move forward.

We're excited that Tiffany's winning design (shown below) will now be printed on T-shirts for the school community, giving her artwork a lasting impact beyond the contest itself.

We are proud of all the student artists who participated and grateful for the opportunity to recognize their creativity, achievement, and positive outlook.
Bryan Trugman
Managing Partner, Attitude Financial Advisors

Last month, we completed the final step in Premier's long-term succession plan. Bob Pugliese has officially transitioned his remaining ownership interest in the firm, and Premier is now owned by Traci Shughart,

the NEW HOURS so you know when support is available.

Share With Clients: Looking for valuable content to share with your clients? FINRA regularly publishes short, easy-to-understand articles covering current scams, fraud trends, investing basics, and other timely financial topics. These resources are written with investors in mind, making them a great way to educate clients, spark meaningful conversations, and demonstrate your ongoing commitment to keeping them informed and protected. Check them out HERE.

SAVE THE DATE
Hershey Annual Meeting
September 9-11, 2026
REGISTER HERE!

Sebastian Sullivan, and Josh Cesare. Welcome to the leadership team Josh!

Traci Shughart
Chief Executive Officer
Registered Principal/Branch Manager

Creating Solutions to Serve You

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Hours of operation: M -Th 8am-4:30pm, Fri 8am-4pm