

Special Announcements

Dear Valued Friends and Clients:

We want to take a moment to inform you of two changes to the McCarthy Grittinger Financial Group team that occurred this year:



We are sad to announce that our veteran CPA, Bob Kult, retired this fall. Bob started with our firm as a tax preparer in 2001 and, since then, has become near and dear to the MGFG family and many clients as well.

Bob loved doing taxes and found his time here to be “too much fun.” It brought Bob great joy to alleviate client fears regarding taxes. Even during the busy “tax” season, Bob was content and had a smile on his face.

Bob’s future will be busy spending time with family, attending his grandchildren’s sporting events, traveling with Laurel and doctor’s appointments (not getting any younger physically)! Bob will greatly miss visiting with clients and helping them with difficult situations.

Thank you very much for your service, Bob. It has been a delight to work with you and you will be greatly missed by all of us! We are grateful to have had you as part of the MGFG family.

We are pleased to announce a new addition to our team, Jacob Hornak. Please read below for a special message from Jacob:

I am thrilled to be a part of the McCarthy Grittinger Financial Group team! I am currently in my final year at UW-Milwaukee pursuing a Bachelor of Business Administration with a finance major and an Investment Management Certificate. The Investment Management Certificate Program is a comprehensive 21 month program where students are given real-world experience as they manage over \$7 million.



During my time in the investment management program, I have explored many different career paths within the investment field. When I learned that the financial advisor role is much more than handling investments – that it is about building relationships and providing comprehensive wealth management solutions – I knew that was the route that I wanted to pursue. My passions are helping others, educating, and building relationships.

In addition to my academic and career goals, my interests include reading, writing, and playing music. I have played the drums for 12 years and recently began teaching myself piano. I have been a part of many bands and love playing all types of music. I also teach drumming. It is incredibly rewarding to help a struggling student see his or her progress.

I am very grateful for the opportunity to continue with MGFG part-time during my final year of school. I look forward to meeting many of you during the upcoming tax season!

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