



NETTUNO  
WEALTH MANAGEMENT



Comprehensive



## WHAT WE DO

### ■ RETIREMENT

We'll help you plan for a happy and fulfilling retirement. From expense analysis to income planning, from

### ■ ESTATE

Estate taxes can have an enormous impact on the transfer of wealth between family members. Proper planning is critical. We'll

## EDUCATION

Nurturing our children is priority number one. Regardless of which educational path they choose, funding it can be a challenge. We'll help you start preparing today with a full suite of resources.

## INCOME

In today's economic environment, managing income can be daunting. We'll help you to put together an income plan that manages your risk. We also focus on income continuation to help protect your family.

## BUSINESS

Business owners have unique challenges...and opportunities. We'll help you establish the right retirement plan for your company, evaluate existing plans, and take steps to protect your business.

## PORTFOLIO ANALYSIS

In uncertain times, proper diversification and portfolio structure is paramount. We'll review your existing investments, wherever they are, so you can be confident you're heading in the right direction. A second opinion never hurts.

# HOW WE DO IT

We employ a 5-step process. This Comprehensive approach starts with understanding you...what's important to you...your dreams...your concerns. It's only after we get to know you that we can begin to build the right solution. We'll review your current situation, establish goals, analyze assets, and define risk tolerance. Finally, we'll utilize all of this information to build a customized solution to meet your needs.





## OUR TEAM

Nettuno Wealth Management advisors are part of a team of investment professionals with offices from coast to coast. From Miami to Seattle, as of December 2018, we manage more than \$3.4 billion in assets for a diverse group of clients. Our advisors have an average of 15 years of industry experience and proudly work together for the benefit of our clientele.

James began his career in the financial services industry in 2003. James provides tailored financial advice and personalized services through wealth management, retirement planning, college planning, portfolio development, and customized investment strategies. James graduated cum laude from the University of Georgia with a Bachelor of Business Administration with a focus in finance and banking. James also holds the advanced certifications of Certified Financial Manager (CFM) awarded by the College of Financial Planning and Certified Special Needs Advisor (CSNA). James has been named a Best Personal Wealth Manager\*\* by Atlanta Magazine seven times. James was also ranked #4 in the University of Georgia's Bulldog 100 for top alumni businessmen in 2010. James is a native Atlantan who attended Our Lady of the Assumption School and Marist School, where he has served on the alumni executive board for the last twelve years, including chairing fundraising for four years and most recently serving as President of the Marist Alumni Association. James resides in Dunwoody with his wife, Sarah, and their boxer, Champ.

To learn more about the professional history of our financial advisor(s) please visit [FINRA's BrokerCheck](#)

Dan Bisese has been a Financial Advisor for nearly a decade. He began his career with Wachovia in 2006. He continued with Edward Jones later and joined Nettuno Wealth Management in 2016.

Dan holds series 6, 7, 63, 66, and Life & Health Insurance licenses. He specializes in retirement planning and college savings, with a goal of preserving assets for the future. He believes it is important for him to listen and understand what his clients are trying to accomplish. From there he can develop strategies to help attain these important goals.

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Bryan Scott is a Financial Advisor with Nettuno Wealth Management. He attended the University of Florida where he received a bachelor's and master's degree in accounting. He now holds both a CPA (Certified Public Accountant) designation as well as the CFP (Certified Financial Planner).

He began his career with Deloitte and Touche. Later he was a manager for tax and reporting at Alltel and Turner Sports. In 2004, Bryan joined Nettworth Financial Group as an experienced financial advisor who specialized in wealth management. After a time with Park Square Financial, Bryan is back with Nettuno Wealth Management where he is helping his clients understand the current financial landscape so that they can maximize their potential.

Bryan has lived in Sandy Springs for over 20 years and is an avid sports fan.

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Angela Holbrook has been a member of the financial services industry for over ten years. She has spent the majority of that time in the banking industry managing and developing relationships within the communities in which she serves. With an in-depth knowledge of the independent advisor space, Angela is eager to assist in advancing the careers of advisors throughout the country. She has shown a knack for matching the right opportunity to the right advisors.

Angela is a native of North Georgia and is an active member of her community where she was born and continues to reside. She has served on numerous community boards, and she presently serves as Past President for the Cumming Kiwanis. Her hobbies include tennis, traveling, reading and of course, the love of college football! She is blessed with a wonderful family; her husband Stephen and their two sons,

Bridget Ghant, Registered Sales Assistant, holds her Series 7 and 63 licenses and has spent the last fourteen years in the financial industry assisting clients and Financial Advisors.

She began her undergraduate degree at Mercer University and later received a Bachelor's in Computer Information Systems from GA Southern University. She started as an Operations Associate for Robinson & Humphrey (Smith Barney) in Augusta GA and went on to work at other firms such as MSSB, Etrade, and PNC Investments. During her career, she has acquired four years of experience as a Staff Manager training Sales Assistants and Financial Advisors in operational processes and procedures. As a team player, building relationships and interacting with all management levels comes very easy to her. She loves to focus on driving core competencies to help build a winning team.

She and her immediate family have been in the Atlanta area for the last 10 years. She is married with one son, Jordan. She spends most of her time these days playing sports mom and spending her time with family and friends.

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## STRENGTH IN PARTNERSHIP

Nettuno Wealth Management works with two long-standing, respected firms to protect your accounts and provide top-notch support to our advisors. Our broker-dealer, **FSC Securities**, and clearing firm, **Pershing**, are synonymous with professionalism and integrity.

### FSC and Advisor Group

Founded in 1958, FSC is an independent wealth management firm with close to 950 independence-minded financial advisors with offices across the United States. FSC is not in the business of creating and marketing it's own investment products - it's only "products" are service and support.

## Pershing

Have you ever wondered what happens to your funds once you've decided to make an investment? Your brokerage account assets are not held at our firm, nor are they held at FSC. They are held at a clearing firm, a separate and independent entity. FSC works with Pershing LLC (member FINRA, NYSE, and SIPC), a subsidiary of The Bank of New York Mellon Corporation, the nation's oldest continuously operating bank. Pershing is a leading provider of global financial services to institutions, corporations, and high-net-worth individuals, and custodies \$1.7 trillion in global client assets.\*

Pershing handles confirmation, delivery, and settlement of your financial transactions. Additionally, it prepares and sends you periodic account statements and transaction confirmations. It also employs technology and procedures designed to ensure that transactions are processed in a timely and efficient manner. Pershing is regulated by the SEC and FINRA, the regulatory bodies that also oversee broker-dealers.

## Advanced Sales and Qualified Plans Team

Through our affiliation with FSC and Advisor Group, we benefit from access to an experienced team of consultants. They partner with our advisors to help provide solution-driven, product-agnostic resources in multiple areas of expertise:

- Estate planning • Charitable planning • Tax strategies • Nonqualified benefit planning • Retirement Income planning • Small business strategies • Insurance planning • Non-qualified benefit planning • Qualified retirement plans • Long-term care planning • Education planning

With this type of support, we can expand the services we offer — by either widening our knowledge of a particular product, or deepening our understanding of a concept with a second opinion. In the end, our clients receive a superior client experience and a comprehensive solution.



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Representative(s) may not be registered to provide securities and advisory services in all states.

#### IMPORTANT CONSUMER INFORMATION

A broker-dealer, investment adviser, BD agent, or IA rep may only transact business in a state if first registered, or is excluded or exempt from state broker/dealer, investment adviser, BD agent, or IA registration requirements as appropriate. Follow-up, individualized responses to persons in a state by such a firm or individual that involve either effecting or attempting to effect transactions in securities, or the rendering of personalized investment advice for compensation, will not be made without first complying with appropriate registration requirements, or an applicable exemption or exclusion. For information concerning the licensing status or disciplinary history of a broker-dealer, investment adviser, BD agent, or IA rep, a consumer should contact his or her state securities law administrator.

Investing involves risk including the potential loss of principal. No investment strategy can guarantee a profit or protect against loss in periods of declining values. Past performance is no guarantee of future results. Please note that individual situations can vary. Therefore, the information presented here should only be relied upon when coordinated with individual professional advice.

\*\*Criteria to be awarded Best Personal Wealth Manager by Atlanta Magazine. (1. Credentialed as an investment advisory representative (IAR), a FINRA-registered representative, a CPA or a licensed attorney. 2. Actively employed as a credentialed professional in the financial services industry for a minimum of five years. 3. Favorable regulatory and complaint history review. 4. Fulfilled their firm review based on internal firm standards. 5. Accepting new clients. 6. One-year client retention rate (the average one-year client retention rate of this year's award winners is more than 96 percent). 7. Five-year client retention rate. 8. Non-institutional discretionary and/or non-discretionary client assets administered (this year's award winners administer an average of \$96 million in client assets). 9. Number of client households served (on average, this year's award winners serve 222 households). 10. Education and professional designations.)

Third-party rankings and recognitions are no guarantee of future investment success and do not ensure that a client or prospective client will experience a higher level of performance or results. These ratings should not be construed as an endorsement of the advisor by any client nor are they representative of any one client's evaluation.

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