



**WILSON WEALTH
ADVISORY GROUP**

OF JANNEY MONTGOMERY SCOTT LLC

**YOUR NEXT CHAPTER—
DESIGNED WITH INTENTION**



WELCOME

Every chapter of life brings new opportunities and important decisions.

You may be asking yourself:

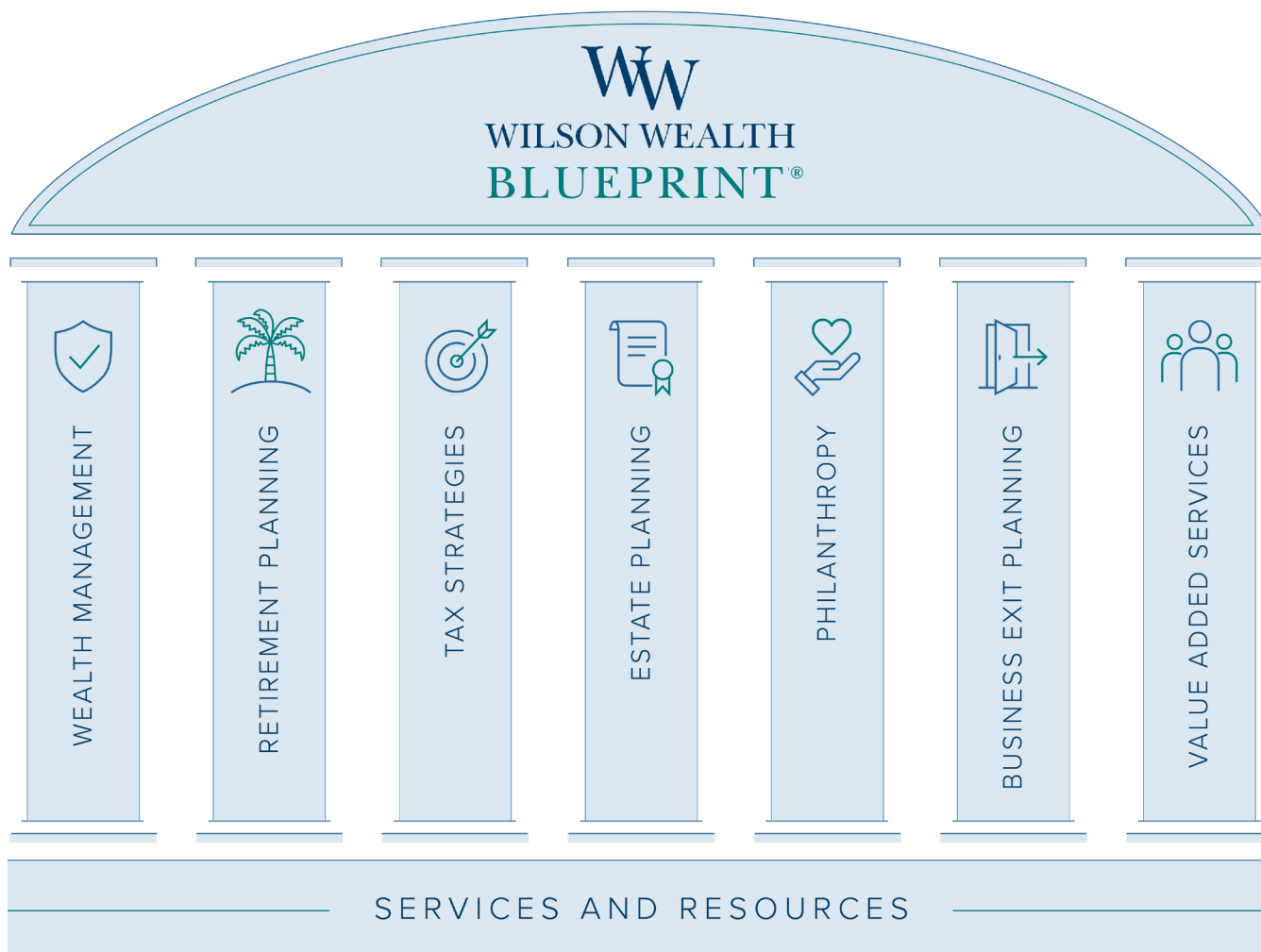
- When can I step away from work and have my wealth support the life I envision?
- How much can I spend on my next chapter—travel, a second home, family, or other priorities—while keeping my long-term plan on track?
- Are my investments, retirement income, Social Security, and tax strategies working together as thoughtfully as they could be?
- How should I prepare today to eventually transfer wealth to my family and the causes that matter most to me?

At Wilson Wealth Advisory Group, we believe wealth management should be about far more than investments.

It should begin with understanding your life.

Our services are best suited for established families, business owners, and professionals approaching or living in retirement who value straightforward guidance, greater coordination across their financial lives, and a thoughtful strategy for making the most of what they've worked hard to build.

COMPREHENSIVE GUIDANCE



EVERY CLIENT'S NEEDS ARE UNIQUE.

The foundation of our work is the breadth of services, capabilities, and intellectual resources available throughout the relationship.

The pillars represent the principal areas in which we apply those resources—from wealth management and retirement planning to tax strategies, estate planning, philanthropy, business exit planning, and value-added services.

The Wilson Wealth Blueprint® is how we bring these elements together and deliver a personalized, ongoing client experience. Rather than addressing each need in isolation, we coordinate the relevant strategies within an approach centered on your life, priorities, and goals.

WILSON WEALTH BLUEPRINT®

Financial planning should not be a one-time event. The Wilson Wealth Blueprint® is our personalized, ongoing process for understanding where you are today, where you want to go, and how your financial life should evolve along the way. Developed and refined over decades of serving clients, the process is designed to provide structure and coordination while remaining flexible enough to adapt as your life, goals, and priorities change.

DISCOVER

We take the time to understand your life, goals, values, and what matters most.

DIAGNOSE

We assess your current financial picture to identify opportunities, risks, and areas that may need attention.

DESIGN

We develop a personalized strategy aligned with your goals, priorities, and vision for the future.

ALIGN

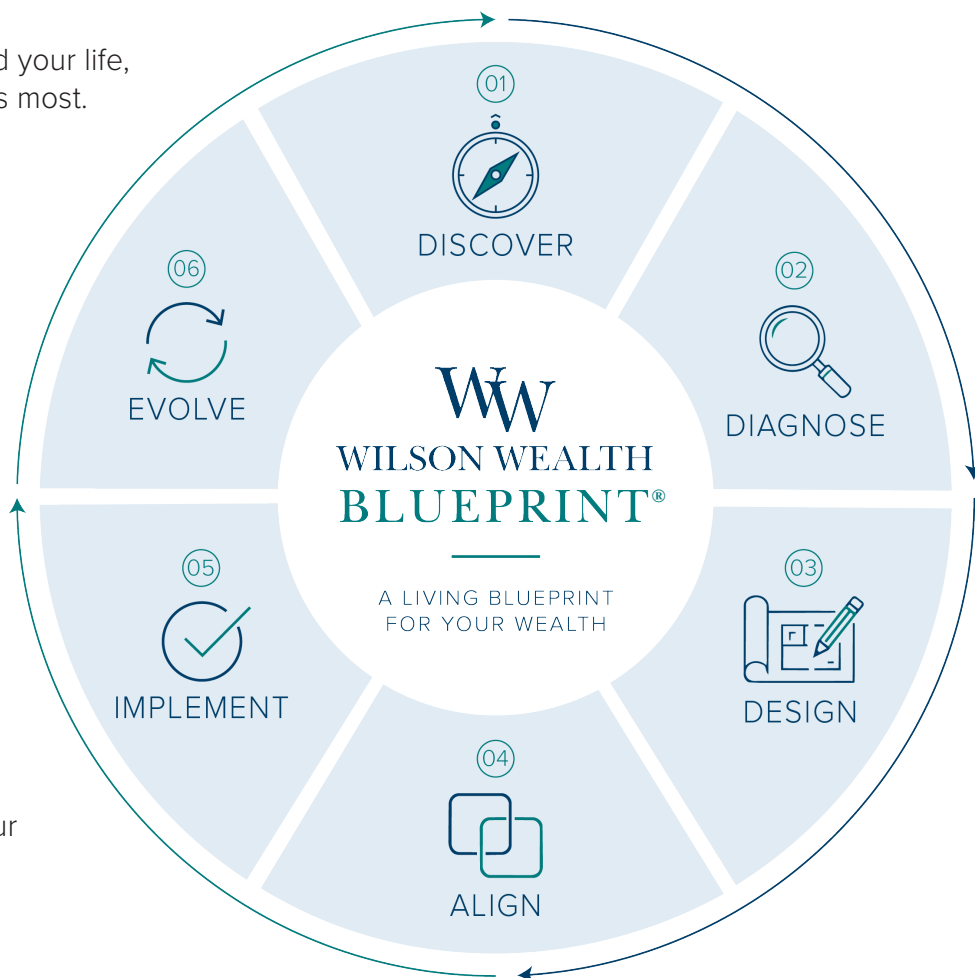
We coordinate every aspect of your financial life to help your strategies work together.

IMPLEMENT

We put your plan into action through a smooth, thoughtful, and well-coordinated process.

EVOLVE

Through ongoing strategy sessions and proactive guidance, we revisit and refine your plan as your life and goals evolve.





THE CLIENT EXPERIENCE

A relationship built around your life.

Advice is only part of a wealth management relationship. How that advice is delivered matters, too. We take the time to understand what is happening in your life—not simply what is happening in the markets. We explain complex topics in clear, practical language, remain accessible when questions arise, and work as a coordinated team so you know whom to call and what comes next.

Our goal is for every interaction—from a strategy session to a service request—to reflect the same level of care, responsiveness, and follow-through.

LIFE-FIRST PERSPECTIVE

Your goals, values, family, and priorities shape the advice we provide.

CLEAR, EDUCATIONAL GUIDANCE

We explain the reasoning behind our recommendations and make complex topics easier to understand.

ACCESSIBLE TEAM SUPPORT

You have access to a team that understands your relationship and is available to assist when questions or needs arise.

PROACTIVE COORDINATION

We communicate next steps, provide timely reminders, and coordinate with your attorneys, CPAs, and other professionals when appropriate.

Knowledgeable guidance. Clearly communicated. Personally delivered.

More than investment management, we seek to be your trusted financial partner as your life and wealth evolve.

MEET THE TEAM

One relationship. A coordinated team. Every member of Wilson Wealth Advisory Group contributes distinct knowledge and a shared commitment to attentive service. Together, our team brings nearly a century of financial services experience, extensive professional education, and a dedication to delivering a consistent client experience. Whether you are discussing strategy with an advisor, calling with a question, or completing an important request, each member of our team has a role in supporting your relationship.



RYAN W. WILSON, CPA, CFP®, CRPC™, AWMA®, AIF®, CEPA®
Managing Director, Financial Advisor

With more than 26 years of experience, Ryan helps individuals, families, and business owners pursue their financial goals through comprehensive wealth management, personalized financial planning, tax-efficient strategies, and investment advice. A graduate of Lehigh University with a degree in Business and Economics and a major in Accounting, Ryan has continued his professional education through Janney's Wealth Management Certification Program and Retirement Income Planning Certificate Program in conjunction with The Wharton School of the University of Pennsylvania. He holds the CPA, CFP®, CRPC™, AWMA™, AIF®, and CEPA® professional credentials and has been recognized on the **Forbes Best-in-State Wealth Advisors** list for four consecutive years (2023–2026). The Wilson Wealth Advisory Group was also named to the **Forbes 2026 Best-in-State Wealth Management Teams** list. Beyond his practice, Ryan serves as Chair of the Finance Committee and co-founder of his church's annual 5K race, is a Board Member of the Boys & Girls Clubs of Northeastern Pennsylvania, serves on the Advisory Council for Lehigh University's Center for Applied Finance, and is a founding member of the Scranton Area Foundation Medallion Partner Alliance.



MARK SANTANIELLO, CRPC™, RSSA®, AWMA®, AIF® | Financial Advisor

As a Financial Advisor, Mark helps clients pursue their long-term financial goals through personalized wealth management, financial planning, and investment guidance. Drawing on nearly three decades of experience building trusted client relationships, Mark is committed to delivering thoughtful, client-focused advice. He is licensed as a General Securities Representative, Registered Investment Advisor Representative, and Life & Health Insurance Representative, and holds the CRPC™, RSSA®, AWMA®, and AIF® professional designations. Prior to joining Janney, Mark spent 27 years in medical sales and was a licensed pharmacist. He earned a bachelor's degree in Pharmacy from Philadelphia College of Pharmacy and Science.



ALEX PUCILOWSKI, AIF®, CRPC®, CLTC® | Account Executive

As an Account Executive, Alex helps individuals and families pursue their financial goals through comprehensive financial planning and investment management. With more than a decade of experience in the financial services industry, Alex works closely with clients to develop personalized financial plans, coordinate investment implementation, and provide ongoing support to help keep their strategies aligned with their long-term objectives. He previously worked with CNL Securities, gaining experience across a broad range of investment solutions and portfolio strategies. Alex earned a bachelor's degree in Finance with a concentration in Personal Financial Planning from Clarion University of Pennsylvania and holds FINRA Series 7, 6, 63, and 65 licenses, Life & Health Insurance licenses, and the AIF®, CRPC™, and CLTC® professional designations.



RENEE R. RINALDI | Senior Registered Private Client Associate

Renee has worked alongside Ryan Wilson for more than 20 years and has been in the financial services industry since 2001. As a primary point of contact for clients, she assists with day-to-day account needs, coordinates requests, and provides responsive, personalized service. Renee earned a bachelor's degree in Business Administration with a major in Finance from Penn State University.



PATTI BETTI, MBA | Private Client Associate

As Relationship Manager and Marketing Director, Patti supports the client experience and the team's community outreach efforts. She leads the planning and execution of educational seminars, client events, and community initiatives. Patti earned a bachelor's degree from the University of Scranton and an MBA from the University of Richmond.



THOMAS THURBER | Registered Private Client Associate

Thomas joined the Wilson Wealth Advisory Group in 2026 after graduating magna cum laude from Monmouth University. He holds his FINRA Series 7 and 66 licenses, as well as his Life & Health Insurance licenses. He supports financial planning, investment implementation, and day-to-day client service while gaining experience across the team's wealth management practice.



EVE HUGHES | Private Client Associate

A member of Janney since 1997, Eve supports the team's day-to-day operations by coordinating client communications, maintaining client records, and assisting with operational needs. Outside the office, she serves as Financial Secretary for her church and participates on several church committees.

ABOUT JANNEY MONTGOMERY SCOTT LLC

With roots tracing back to 1832, the Financial Advisors of Janney Montgomery Scott LLC have continued to build their reputation for providing timely service and knowledgeable financial consultation to individual and institutional clients.

Janney Montgomery Scott LLC is an integral part of the nation's financial history, having held the second oldest membership on the New York Stock Exchange. Through this unique perspective, we have seen our industry—and our clients—evolve. We have adapted to meet the challenges presented by change while adhering to the core principles of our founders—and our client commitment: service, trust and integrity. Our core principle is helping individuals and their families grow, manage, protect and transfer their wealth.

IMPORTANT DISCLOSURES

Your Relationship With Janney

Depending on your financial needs and personal preferences, as well as the fees and costs associated with those services, you may opt to engage in a brokerage relationship, an advisory relationship or a combination of both. Each time you open an account, we will make recommendations on which type of relationship is in your best interest based on the information you provide when you complete or update your client profile.

If you engage in a brokerage relationship, you will buy and sell securities on a transaction basis and pay a commission for these services. Our recommendations for the purchase and sale of securities will be based on what is in your best interest and reflect reasonably available alternatives at that time. If you engage in an advisory relationship, you will pay an asset-based fee which encompasses, among other things, a defined investment strategy, periodic review, and performance reporting. We will serve in a fiduciary capacity for your advisory relationships.

For more information about Janney, please see Janney's Relationship Summary (Form CRS) on www.janney.com/crs which details all material facts about the scope and terms of our relationship with you and any potential conflicts of interest.

Awards and Recognitions

Reference to any award, accolade, or third-party rating received by Janney Montgomery Scott LLC ("Janney", "the Firm") or an employee of Janney herein do not constitute a guarantee of future investment success, nor does an award, accolade, or third-party rating imply any specific level of skill or performance in relation to services provided through the Firm. The selection process for this award is based on certain criteria determined by the awarding entity, which may differ from those of other awards, and may not necessarily reflect a Financial Advisor's overall performance or individual qualifications. This recognition should not be considered as an endorsement or guarantee of any Financial Advisor. As with any financial planning or investment advice, past performance is not indicative of future results, and investors should carefully consider their personal financial goals and risk tolerance before making decisions. For more information about any awards referenced, including relevant criteria, please visit Janney.com/award-disclosures or contact your Financial Advisor.

CONTACT US

Wilson Wealth Advisory Group of Janney Montgomery Scott LLC

Your Next Chapter—Designed with Intention

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