



PRESS RELEASE

FOR IMMEDIATE RELEASE

**JARED MOTZENBECKER RECEIVED COVETED
FIVE STAR WEALTH MANAGER AWARD**

SARASOTA, FL (October 25, 2022)—Jared Motzenbecker, Director of Wealth Services for Gulfside Wealth, a full-service wealth management group affiliated with Gulfside Bank, was recently awarded the coveted Five Star Wealth Manager Award.

“I am honored to be recognized by Five Star Professional,” says Motzenbecker, “It’s always nice to be on an exclusive list, but my priority and my passion is helping clients realize their financial dreams.”



Five Star Professional employs a rigorous research process to identify Five Star Wealth Manager award winners in cities across the U.S. Award-winning professionals were carefully selected from among thousands of wealth managers for their knowledge, service, and experience. Winners represent some of the most dedicated financial professionals, each committed to pursuing professional excellence and providing exceptional service to their clients. Five Star Professional identified award candidates based on industry data, and nominations received from industry firms and individuals (self-nominations are not accepted). Only candidates who satisfied 10 objective eligibility and evaluation criteria have been named Five Star Wealth Managers.



Jared R. Motzenbecker, CFP®, CMT, CPWA®

Jared Motzenbecker is a Certified Financial Planner™ practitioner, Chartered Market Technician, and a Certified Private Wealth Advisor® professional. He has been in the Financial Services industry for more than 15 years and brings extensive knowledge in Financial Planning, Family Dynamics, Estate Optimization, and Investment Portfolio Management.

Jared has been featured as a Keynote speaker across Florida on topics covering Estate and Retirement Planning, Family Dynamics, and Behavioral Finance. He earned his bachelor's degree from the University of Florida, studied financial planning at The University of Georgia Terry School of Business, and Wealth Management Theory and Practice at Yale School of Management.

Jared offers a fully personalized, concierge Wealth Planning engagement to his clients. His unique approach to Wealth Planning incorporates proven research in personality type and behavioral finance. Combined with innovative financial planning tools, Jared guides individuals and families to make more informed, satisfying decisions. He believes that having a better understanding of yourself, and what drives your decisions, combined with education and coaching around behavioral finance, allows clients to make more informed decisions, achieve better outcomes, and lead more fulfilling lives.

Jared was raised in Venice, FL and currently lives in Lakewood Ranch with his wife Tara and their children, Zoe and John. In his free time, he enjoys fishing, hiking, reading, and laughing out loud with his family.

FIVE STAR WEALTH MANAGER CRITERIA

The Five Star Wealth Manager award is presented to wealth managers who satisfy 10 objective eligibility and evaluation criteria associated with outstanding work.

Eligibility Criteria – Required

1. Credentialed as an investment advisory representative or a registered investment adviser.



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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.

Evaluation Criteria – Considered

6. One-year client retention rate.
7. Five-year client retention rate.
8. Non-institutional discretionary and/or non-discretionary client assets administered.
9. Number of client households served.
10. Education and professional designations.

ABOUT GULFSIDE BANK

Gulfside Bank is a full-service community bank in Sarasota, Florida, offering a variety of retail, commercial and private banking services. With deep roots in the community, Gulfside Bank is locally owned and managed, and is committed to building long-lasting relationships with its clients, no matter how big or how small. For more information, visit them online at gulfsidebank.com.

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