



PRESS RELEASE

FOR IMMEDIATE RELEASE

JARED MOTZENBECKER JOINS GULFSIDE INVESTMENT SERVICES

SARASOTA, FL (April 20 2021)—Gulfside Investment Services, a full-service wealth management group affiliated with Gulfside Bank, announced today that Jared Motzenbecker has joined the Gulfside Investment Services team.



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 R. Motzenbecker, CFP®, CMT, CPWA®

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.

Tim Self, Director of Investments at Gulfside Investment Services states, “We are thrilled to have Mr. Motzenbecker join our team. His professional credentials and extensive financial experience will be a valued asset to this organization and our clients.”



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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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