Mainsail Wealth Advisors
2025 NEWSLETTER

Welcome to the 2025 Edition

As we embark on another exciting year, we are thrilled to bring you the latest updates, key accomplishments, and future plans that shape our journey. This edition highlights significant milestones, showcases inspiring stories, and provides insights into upcoming initiatives.

Inside you'll find updates on our recent projects, industry trends and notable achievements within our organization. We also celebrate the dedication and contributions of our community, while offering a preview of what lies ahead in 2025.

We invite you to explore this edition and stay connected with us as we continue to innovate, grow, and make an impact. Thank you for being a valued part of our journey!

Team Retreat

In early December, the team took a well-deserved break from the hustle of wealth management to gather for a meaningful team retreat. The weekend kicked off with a focused leadership meeting, where our management team came together to align on vision, strategy, and goals for the upcoming year. It was a valuable time for reflection, collaboration, and planning the future of our practice.

As the weekend continued, the entire team joined in for a home-cooked meal that brought warmth and community to the table. Everyone enjoyed a delicious spread prepared with care.

To top it all off, we ended the evening with a festive Secret Santa gift exchange—plenty of laughter, surprise, and holiday spirit filled the room as gifts were unwrapped and shared.

Events like this remind us that our strength as a practice lies not only in the work we do, but in the relationships we build. Here's to a strong finish to 2024 and an even stronger start to 2025!

Sunset on the James River

Inside this issue

Special Points of Interest

- Key Milestones Achieved
- Exciting Projects on the Horizon
- Community Spotlight: Stories of Impact
- Upcoming Events & Opportunities

100 Next Gen Advisors to Watch Full Rankings

See the full rankings here: https://www.advisorhub.com/advisors-to-watch-next-gen-2024/. 2024AdvisorHub 100 Next Gen Advisors to Watch, is based on the period from 12/31/2022 – 12/31/2023 and was released on 6/20/2024. 1,816 nominations were received, and 100 advisors won. Neither Raymond James nor any of its advisors pay a fee in exchange for this award. More: https://bit.ly/3wlnwRr.

2025 Forbes Top Wealth Advisors Best-In-State Full Rankings

2025 Forbes Top Wealth Advisors Best-In-State, developed by Shook Research, is based on the period from 6/30/2023 to 6/30/2024 and was released on 4/8/2025. 48,944 nominations were received and 9,722 advisors won. Neither Raymond James nor any of its advisors pay a fee in exchange for this award. More: https://bit.ly/3E2glf4. Please see https://www.forbes.com/best-in-state-wealth-advisors for more info.

Jason Koptish: Elevating Excellence as Private Wealth Advisor & Certified Wealth Strategist

At Mainsail Wealth Advisors, Jason Koptish's unwavering dedication to both his clients and his profession has been a key factor in his continued success. Recently, Jason reached another milestone in his career by earning the prestigious Private Wealth Advisor (PWA) and Certified Wealth Strategist® (CWS®) designations. These credentials underscore his expertise in working with high-net-worth individuals and families, further solidifying his role as a trusted advisor in an increasingly complex financial landscape.

The PWA and CWS® certifications enable Jason to provide highly specialized advice, particularly in navigating the nuanced and intricate financial planning needs of affluent clients. Beyond the technical knowledge these designations offer, Jason's philosophy of personalized, relationship-based service remains at the core of his practice. His deep understanding of the unique challenges high-net-worth families face empowers him to deliver tailored solutions that evolve alongside his clients' goals.

As one of the Managing Partners at Mainsail Wealth Advisors, Jason's leadership sets the tone for the entire team. His emphasis on a culture of excellence, integrity, and forward-thinking financial strategies has fostered an environment where each team member is encouraged to grow and deliver exceptional results. Under his guidance, Mainsail continues to lead in the wealth management space, with a focus on providing clients with innovative solutions that address both today's challenges and tomorrow's opportunities.

These new designations mark just the latest chapter in Jason's ongoing pursuit of excellence. With a clear vision for the future of wealth management, he is poised to continue delivering unparalleled value to his clients, his team, and the industry as a whole.

Jason Recognized as Leading Wealth Advisor Again in 2025

We are thrilled to announce that Jason Koptish, CWS®, CFP®, Managing Partner at Mainsail Wealth Advisors, has been named to the *Forbes Top Wealth Advisors Best-In-State* 2025 list. This marks his fourth consecutive year receiving this prestigious honor, which recognizes the nation's top financial advisors for excellence in wealth management.

The Forbes ranking, developed by SHOOK Research, evaluates advisors based on several key factors, including revenue trends, assets under management, compliance records, and client satisfaction. Jason's consistent inclusion in this list is a testament to his unwavering dedication to delivering exceptional financial strategies and advice. It highlights his continued success and ability to help clients achieve their financial goals with personalized, strategic guidance.

In addition to his Forbes recognition, Jason has also earned a spot on *AdvisorHub's* 2024 "100 Next Gen Advisors to Watch" list. This distinction showcases his exceptional talent, leadership, and growing influence in the industry. These honors underscore not only Jason's individual achievements but also the collective success of the team at Mainsail Wealth Advisors.

As Jason continues to raise the bar in wealth management, we remain incredibly proud of his accomplishments. His inclusion in these elite rankings is a reflection of his commitment to excellence and his dedication to providing the highest level of service to clients.

Congratulations, Jason, on these well-deserved accolades! We look forward to many more years of success and continued leadership at Mainsail Wealth Advisors.

Peyton Bodziak Earns CERTIFIED FINANCIAL PLANNER® Professional Designation

We are proud to share that Peyton Bodziak, Client Service Associate, has earned the prestigious CERTIFIED FINANCIAL PLANNER® (CFP®) designation. This achievement is the result of rigorous coursework, thousands of hours of financial planning experience, and successfully passing a comprehensive exam—all while adhering to the highest ethical standards.

Peyton joins Jason Koptish and Scott Haley as the third CFP® certificant on our team, further strengthening our practice's expertise and reaffirming our commitment to delivering the highest level of service to our clients. Jason Koptish, CWS®, CFP®, Managing Partner, stated, "This is a huge accomplishment and a testament to her hard work and dedication to learning the craft of financial planning. Peyton, we are so proud of you and grateful to have you on the Mainsail Team!"

"This is a huge accomplishment and a testament to her hard work and dedication to learning the craft of financial planning. Peyton, we are so proud of you and grateful to have you on the Mainsail Team!" - Jason Koptish, CWS®, CFP®, Managing Partner

Peyton Passes Series 7 Exam

Peyton Bodziak, CFP® and Client Service Associate, has successfully passed the Series 7 exam! This milestone marks another important step in Peyton's journey toward becoming a well-rounded financial professional.

The Series 7 exam is an essential certification that enables Peyton to broaden her expertise in financial products and investment strategies, empowering her to better serve our clients. Her success reflects her unwavering dedication to continuous learning and her passion for providing exceptional financial guidance.

At Mainsail Wealth Advisors, we are incredibly proud of Peyton's determination to grow professionally. We are excited to see how her expanded knowledge will enhance the service she provides to clients and contribute to the continued success of our team.

CERTIFIED FINANCIAL PLANNER®

Certified Financial Planner Board of Standards Center for Financial Planning, Inc. owns and licenses the certification marks CFP®, CERTIFIED FINANCIAL PLANNER®, and CFP® (with plaque design) in the United States to Certified Financial Planner Board of Standards, Inc., which authorizes individuals who successfully complete the organization's initial and ongoing certification requirements to use the certification marks.


Mainsail Office in Richmond, VA

Gilda Burket Earns Registered Client Service Associate Designation

We are thrilled to announce that Gilda Burket has officially earned the title of Registered Client Service Associate! This prestigious achievement follows her successful completion of the Series 7 and Series 66 exams, marking a significant milestone in her professional development.

As a Registered Client Service Associate, Gilda will continue to play an even more integral role in supporting our clients. Her enhanced expertise will allow her to provide personalized and knowledgeable financial guidance, helping clients navigate their financial journeys with confidence. Gilda's dedication and commitment to her professional growth align perfectly with the values at Mainsail Wealth Advisors, and we're excited to see her continue to thrive in this new capacity.

Financial Advisor and Managing Partner Scott Glaze, CRPC®, commented, "Gilda's achievements are a testament to her passion for excellence and commitment to serving our clients with the highest level of expertise. We look forward to her ongoing contributions to our team and the exceptional service she provides to our clients."

"Gilda's achievements are a testament to her passion for excellence and commitment to serving our clients with the highest level of expertise."
- Scott Glaze, *CRPC®,* Managing Partner

Gilda Passes Series 66 Exam

Gilda has successfully passed Series 66 exam, solidifying her commitment to expanding her knowledge and expertise in the financial industry.

The Series 66 exam, a major milestone in the industry, is a comprehensive test covering a wide range of financial topics.

Passing the exam further strengthens Gilda's ability to provide professional service and guidance. This certification ensures that she is well-equipped to meet the evolving needs of our clients and deliver top-notch service.

Empowering the Future: Mainsail's 2024 Summer Interns

In the summer of 2024, Mainsail Wealth Advisors had the pleasure of welcoming two bright and talented students to our team as part of our Summer Internship Program. Shelton Glaze, a student from James Madison University, joined us as our Financial Planning Intern, while Jack Witmer, from the University of Virginia, came on board as our Investment Analyst Intern.

Both Shelton and Jack brought fresh perspectives, innovative ideas, and an eagerness to learn, contributing greatly to our team and creating a dynamic atmosphere throughout the summer. Their enthusiasm and hard work helped enhance the collaborative culture at Mainsail, and we were thrilled to see them grow both professionally and personally during their time with us.

We're excited to have had the opportunity to invest in their futures and provide real-world experiences in the fields of financial planning and investment analysis.

Shelton Glaze

Jack Witmer

Bridging the Gap: Inspiring the Next Generation of Financial Planners

Our team is passionate about helping the next generation of financial planners succeed. Last year, three of our team members had the opportunity to connect with students at Virginia Tech, sharing valuable insights into the world of financial planning and wealth management.

Jason Koptish, CWS®, CFP®, Nick Shedd, CFA, and Peyton Bodziak , CFP® – had the privilege of visiting Virginia Tech to speak with students in the Financial Planning and Wealth Management major during their Financial Planning Technology & Modeling class. This session provided an opportunity for students to learn firsthand from industry professionals about real-world investment strategies and decision-making processes. By bridging the gap between classroom theory and industry practice, we hope to inspire the next generation of financial planners to succeed in their careers. A special thank you to Jesse Lineberry, MSF, CFP® for the warm welcome and the opportunity to engage with such bright students in Blacksburg!

From left to right: Peyton, Nick, Jason

Mainsail Team Challenge: A Tie for the Win!

The team challenge at Mainsail Wealth Advisors was a true testament to our competitive spirit and dedication to excellence. Spanning the second and third quarters of 2024, the competition focused on meeting our annual operational goals, with a strong emphasis on delivering exceptional client service.

We're thrilled to announce that the challenge ended in a tie, with every participant meeting their goal! The results reflect our team's commitment to going above and beyond for our clients, and the enthusiasm throughout the challenge was truly inspiring. While there may have been no single winner, everyone walked away with a sense of accomplishment and, of course, some exclusive Mainsail gear to celebrate their success.

Here's to continued teamwork and success in the year ahead!

Paint the Town Purple

This past September, our team had the privilege of participating in the local "Paint the Town Purple" event, a powerful initiative aimed at raising awareness for the Walk to End Alzheimer's. Held from September 6th to 11th, the event invited local businesses to decorate their spaces in vibrant purple—the color that represents the fight against Alzheimer's disease.

While we didn't win the contest for the best purple display, we were proud to contribute to the effort to raise awareness and support the Middle Peninsula Northern Neck Walk to End Alzheimer's. The event brought the community together for a meaningful cause, and we were honored to stand alongside other businesses in supporting this critical fight.

Though the contest was fun, the real victory lies in the collective effort to spread awareness, foster kindness, and support those affected by Alzheimer's. We are grateful to be part of this initiative and look forward to continuing our support for the fight against Alzheimer's in the future.

2024 Shred and Support Drive

At Mainsail Wealth Advisors, we believe in the power of giving back to our community and supporting causes that make a meaningful impact. This past September, we had the privilege of hosting a Shred & Support Drive, a unique event open to the public designed to help individuals safely dispose of sensitive documents while contributing to a cause close to our hearts—the Alzheimer's Association®. With the help of professional shredding services, we ensured that all documents were securely destroyed, protecting participants from the risks of identity theft and fraud.

Beyond providing this valuable service, the Shred & Support Drive also supported a cause that affects millions of individuals and families across the country. Attendees were encouraged to make a donation to the Alzheimer's Association as part of the event. By participating, the public not only safeguarded their personal information but also contributed to a mission that touches countless lives.

We would like to extend our heartfelt thanks to everyone who joined us for the Shred & Support Drive. Your generosity helped make a difference in the fight against Alzheimer's disease.

2024 Walk to End Alzheimer’s

Our Mainsail Team understands that Alzheimer’s and other forms of dementia don’t just affect individuals—they impact families, friends, and entire communities. That’s why we were proud to sponsor and participate in the Walk to End Alzheimer’s on October 5, 2024.

This event was particularly meaningful to our team as we’ve seen firsthand the profound effects these diseases have on the lives of our clients and their loved ones. By joining forces with the Alzheimer’s Association, we were able to show our support and help raise awareness for a cause that hits close to home.

Gilda Burket shared, *“Supporting the Alzheimer’s Association is deeply personal to me and my family. We’ve experienced the heartbreak of watching a loved one face this disease, and it motivates us every day to fight for a future where no one has to endure it.”*

Our team, along with clients, friends, and family members, came together to take steps toward a brighter future. Every stride we made and every dollar we raised brought us one step closer to the ultimate goal: a world without Alzheimer’s disease.

We were inspired by the overwhelming support from the community and the incredible energy at the event. It's a powerful reminder of how collective action can make a real difference, and we are grateful for everyone who participated with us.

We are excited to announce that we will once again be participating in this year’s Walk to End Alzheimer’s. Be on the lookout for more details coming soon on how you can join us in making another meaningful impact. Together, we can continue to work toward ending Alzheimer’s and building a future where families don’t have to face the challenges of dementia.

Thank you to all who joined us last year, and we look forward to walking with you again this year. Your efforts are helping us get closer to a cure and a brighter tomorrow.

“Supporting the Alzheimer’s Association is deeply personal to me and my family.”
- Gilda Burket, Registered Client Service Associate

A Season of Giving: Mainsail's Foster Care Angel Tree

During the 2024 holiday season, Mainsail Wealth Advisors had the privilege of supporting local foster children through our Foster Care Angel Tree initiative. This heartwarming tradition allowed our team, clients, and community members to come together and bring joy to children in need.

The Angel Tree was displayed in our office, with each ornament representing a child's wish list. Visitors were invited to choose an ornament, purchase a gift from the child's list, and drop it off at our office. Once all the gifts were collected, they were picked up by Social Services, who delivered them directly to the foster children in our community.

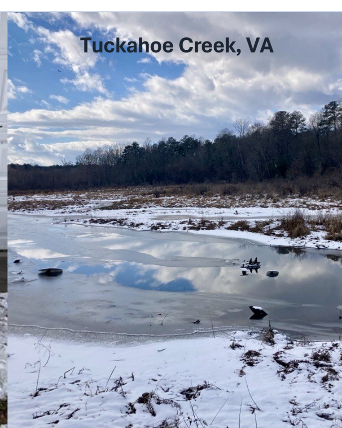
Lynne Freeman, our Client Service Associate who helped coordinate the event, shared, *"The joy of seeing our team, clients, and the community come together to make a real difference in the lives of these children was truly heartwarming. The Foster Care Angel Tree brings out the best in everyone, and it's a privilege to be a part of something so impactful during the holiday season."*

This initiative brought our team closer together as we shared in the spirit of giving and made a tangible difference in the lives of children who might otherwise go without during the holiday season. We're incredibly grateful to everyone who participated and helped make this holiday season brighter for so many.

We look forward to continuing this tradition and spreading even more joy in the years to come!

"The Foster Care Angel Tree brings out the best in everyone, and it's a privilege to be a part of something so impactful during the holiday season."
- Lynne Freeman, Client Service Associate


Lynne Freeman


Tuckahoe Creek, VA

1st Annual Pumpkin Decorating Contest

Last year, we hosted our very first Mainsail Pumpkin Decorating Contest, and it was a fantastic way to bring out everyone's creativity and competitive spirit! We had a great time decorating our pumpkins, with a variety of themes that showcased the fun and unique ideas of our team.

"*The pumpkin decorating contest was such a fun and creative way for everyone to embrace the festive season*," said Randi Zahm, the organizer of the event.

The pumpkins were displayed for all to enjoy, and everyone had the chance to vote for their favorites in two categories, "Most Creative" and "Best Theme." With prizes on the line, the contest was a fun and spirited way to celebrate the season and connect with colleagues. We're already excited to see what everyone comes up with for this year's contest!

Mainsail Wealth Advisors

We are a boutique financial advisory practice that focuses on guiding individuals through life's important financial decisions. Our team offers personalized strategies, retirement planning, and wealth management services, with a focus on creating tailored plans that align with clients' long-term goals. We are committed to helping clients navigate market conditions, whether they are experiencing major life changes or simply seeking to optimize their financial future. With a strong track record of providing clear, client-centered advice, Mainsail Wealth Advisors ensures that every client stays on course toward achieving their financial dreams.

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