



D|A|DAVIDSON

CAMERON WEALTH PLANNING

A member of D.A. Davidson & Co. member SIPC

With the turmoil in the regional banking sector, I wanted to share information about D.A. Davidson as well as reiterate how your securities are protected. Click [here](#) for our 2022 annual report and a summary of the firm. In addition to some beautiful photographs, the annual report highlights our businesses, confirms our commitment to philanthropy and details our company values. Having recently celebrated my 15th year here, I can attest to the firm's commitment to these values; it isn't just show. The firm has five primary businesses: Wealth Management (where I work), Equity Capital Markets, Fixed Income Capital Markets, Davidson Investment Advisors, and D.A. Davidson Trust Company. We are not a bank. We manage close to \$64 billion as of 3/31/2023. The company is 100% employee-owned and the firm has a generous profit-sharing plan. Last year D.A. Davidson donated \$1.2 million to charitable organizations. On a more personal note, in August I attended an event for the Russell Museum in Great Falls, Montana, where D.A. Davidson was founded and maintains its headquarters. Larry Martinez, Chief Executive Officer, gave us a tour and introduced our group to many of the employees. Larry knew everyone's name and their tenure at the firm, including Denise Wegner, employee since 1977 and our firm's third longest employee. He also knew their spouses and their kids and where they were in school and what activities they were involved in. His humble nature, brilliance, and commitment to doing what is right is inspiring.

Although the annual report may lack some diversity in leadership positions, I've been assured that our firm is making strides to be more inclusive. The company's three highest awards in 2022 were all given to women. I am very proud to work for D.A. Davidson and am confident in our future. But if that isn't enough, rest assured, your investments are segregated from the company's and if anything were to happen to the company, click [here](#) to read about how your assets are protected.

As always, if you have any questions, do not hesitate to contact us.

Lyn Cameron

"The best ability is availability. When you work with and for the best people in the business and you love what you do, showing up every day is a joy, but more than that, it is a privilege." -Charlie Cameron

LYN CAMERON, CFP® | Senior Vice President, Financial Advisor, Portfolio Manager

CA Insurance License #4115534

DA Davidson CA Insurance License #0763476

lcameron@dadco.com | p: 503.863.5085 | f: 503.863.5095

1300 SW Fifth Avenue, Suite 1950

Portland, OR 97201

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www.cameronwealthplanning.com

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