



The Otto Group Grows and Moves

There is no doubt that 2020 and the first quarter of 2021 have been the some of the most challenging times our country has faced.

Regardless of myriad personal, national, and international adjustments; we all have worked cohesively to rise above and move forward. For you - our clients, colleagues, and friends - family and business life may be different today, and into the future. As we recognize the meaningful results of the global pandemic, and how we now live in these new times, our team is continually grateful for our ability to support and guide you and your family's achievement of financial wellness.

We would like to make two significant announcements, for which we are extraordinarily thankful. It took many of our Sarasota, Chicago, and New York Hightower colleagues to bring this great news to fruition. A special thank you to each one of you. We could not have achieved so much without you!

We've Grown!

The Otto Group is proud to announce Michael Wood as a member of our Team! Michael joins us as an Investment Operations Analyst who supports our team in multiple ways.

A new position to The Otto Group, Michael partners with our Director of Operations, Andrew Turley, and advisors in both review & monitoring of various assets within our client portfolios. Working alongside Matt Otto and Alex Gault, Michael aids in implementing client portfolio solutions using various research, technology, and daily collaboration with our professional colleagues at Hightower, Fidelity, and many Wall Street firms. Among other responsibilities, Michael executes trades, structured note and alternative investment purchases, and is responsible for reporting maturing assets, cash balances, cash flow summaries, credit facilities, and portfolio reconciliation. Michael also works to prepare and distribute our quarterly and annual performance reports for client portfolios.

Michael is a May 2021 graduate from the University of South Florida with a Bachelor of Science in Finance, with a concentration in Asset Management. Michael joined us in March 2021 as a part-time team member and was offered full time status as of graduation day, May 7th! While in his final quarter at USF, he earned his Bloomberg Market Concepts Certificate of Completion.

Michael is a life-long resident of Cortez Village. For 25 years his father has operated a commercial fishing fleet, which Michael has always been in support of the family business. One of three sons, he is the first to graduate college, is a graduate of Manatee High School, and continues to live in Cortez Village.

Michael is a quick learner and savors our finance industry. In his spare time, you may find Michael on the golf course, or captaining one of the family boats from the Cortez docks.

We are proud to tell this story of a local resident who attended a local university, worked locally during school, and chose to accept a finance industry position, locally!

We've Moved!

The Otto Group has moved our office! After celebrating our five-year anniversary of joining Hightower Advisors, LLC, we have relocated to the Plaza at Five Points in downtown Sarasota.

Construction of our new office space began in January 2021 and continued up and until May 21st, which was move day. The office is a gorgeous rendering of floor-to-ceiling glass windows and walls throughout. A view of Sarasota Bay and Marina Jack can be seen from anywhere in the office. New, modern furnishings complete the space, for which we are all grateful.

While there were many meaningful benefits of moving, we are especially excited to note our new location offers Valet Parking! We anticipate that this complimentary service to our clients and friends will be an added feature for your future visits!

Our new address is:

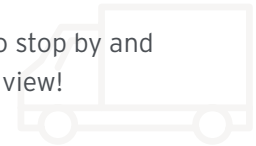
THE OTTO GROUP
PLAZA AT FIVE POINTS
50 CENTRAL AVENUE, SUITE 930
SARASOTA, FL 34236

Our contact telephone numbers, email, and facsimile all remain the same

You can reach us at Suite 930 from
9:00 a.m. to 5:00 p.m. each day

Access *Complimentary Valet Service*
by entering on 1st Street

We welcome you to stop by and
take in the view!



Meaningful Work with Meaningful People

You've all heard us speak of our Team Mantra - Meaningful Work with Meaningful People. This year we could not be more grateful for all our relationships, near, and far, whether new to us, or have worked with us for many years.

We would like to share that each of you brings our Team joy and belonging - and allows us to express passion for our work within the industry we've each chosen. As we gather around our conference table discussing your family's Advanced Planning guidance, developing sophisticated investment solutions, or supporting your familial life-cycle changes, we are proud to be here. You are meaningful to us.

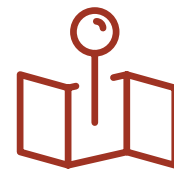
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