



For Immediate Release

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Naples, Florida – HBKS® Wealth Advisors (HBKS®) announced today the signing of a definitive merger agreement under which Global Wealth Consultants (GWC) of Naples, Fla., will join its multidisciplinary financial services firm.

“We welcome Global Wealth Consultants, which shares our client service philosophy of establishing enduring relationships that serve clients’ best interests,” said Christopher Allegretti, CPA and CEO of HBKS® Wealth Advisors.

“The merger will result in a substantial expansion of our expertise and services,” noted Mark Matos, CFP® Senior Financial Advisor of Global Wealth Consultants. “Though we spoke with several large firms about the possibility of joining them, HBKS Wealth Advisors stood out because their scope of service will benefit our clients in the Naples market in a way that wasn’t possible for us before.”

GWC has served the Naples area since 2008. Its clients are affluent individuals and small and medium-sized businesses.

“HBKS has an excellent reputation. We’re excited they selected us to join their team,” said Matos.

Matos and the GWC team will join HBKS® Principal Christopher Sorce and his team in the HBKS offices in Naples.

“This merger makes great sense,” Sorce noted. “We share common values, including belief in a client-centered culture. It’s great to be working together. We’re all excited about what this will mean for clients of both firms.”

HBKS® Wealth Advisors is a division of HBK, rated a Top 100 firm by both Accounting Today and Inside Public Accounting magazines. HBKS® was established in 2001 when HBK merged with The Sorce Financial Group, an advisory firm operating since 1950. The resulting HBKS serves clients from 10 offices in Ohio, Florida and Pennsylvania, and has assets under management of more than \$1.75 billion.

Insurance products offered through HBK Sorce Insurance LLC. Investment Advisory Services offered through HBK Sorce Advisory LLC, doing business as HBKS Wealth Advisors, an SEC registered investment advisory firm. Not FDIC Insured – Not Bank Guaranteed – May Lose Value, Including Loss of Principal – Not Insured By Any State or Federal Agency.