



# HBKS Wealth Advisors Promotes Professionals to Senior Financial Advisor and Portfolio Manager

**Chris P. Allegretti and Denise Williams promoted to Senior Financial Advisor, Ethan Berkebile to Portfolio Manager.**

**S**enior financial Advisor **Christopher P. Allegretti** began his career at HBKS as an intern with the firm. After earning his Bachelor of Science in Finance from The Pennsylvania State University, he accepted a position as a Financial Advisor working out of the firm's office in Erie, Pa. Chris was a member of the National Society of Leadership and Success at Penn State and graduated "with distinction."

Chris is an insightful professional who has authored articles on a wide range of subjects, from tax loss harvesting to in-retirement planning to investing for heirs and extensively on issues important to young investors.

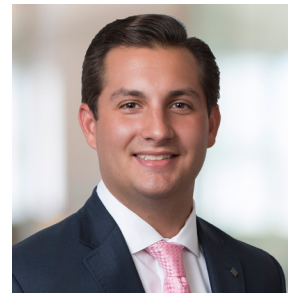
"We offer our congratulations to Chris on his well-deserved promotion," said Erie HBKS Principal Quinto Ambrosetti. His exceptional skills and commitment to

not only our team, but the firm as a whole, has made him indispensable to our success."

Chris is active in various charities, including the Penn State Dance Marathon, which provides financial and emotional support to children with pediatric cancer, and Swings for Soldiers in State College, a golf tournament program benefiting veterans. A longtime and avid hockey player and enthusiast, he continues to play hockey in the adult leagues in Erie and Meadville.

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— **QUINTO AMBROSETTI** | HBKS Principal



**Chris P. Allegretti**  
HBKS Senior Financial Advisor



**Denise Williams, CFP, CPA**  
HBKS Senior Financial Advisor

**S**enior Financial Advisor **Denise Williams, CFP, CPA** joined HBKS Wealth Advisors in 2017 as a financial advisor working out of the firm's office in Naples, Fla. She began her professional career at HBK CPAs & Consultants in 2005 as an auditor while earning her CPA designation. She is a native of Naples and graduated from the University of South Florida in Tampa with a Bachelor of Science in Business and a major in Accounting. She holds joint designations as a Certified Financial Planner and Certified Public Accountant.

Denise serves as advisor to a wide range of clients and has deep expertise in various industries and disciplines, including construction, agriculture, and workers' compensation. Prior to joining HBK, she served as CFO at Taylor Elevator Corporation in Naples.

Denise is a regular contributor of industry-related content,

a wide variety of materials designed to help clients negotiate their financial landscapes and capitalize on opportunities to grow and protect their wealth. Among her most recent published works are articles on recency bias in investing, China's economy, alternative trading options, and behavioral finance.

"We are very proud of Denise and her accomplishments as she is promoted to Senior Financial Advisor," noted Naples HBKS Principal and Senior Financial Advisor Brian Mallette. "Denise is the ultimate team player, an extremely valuable asset to our team and the firm's future success. A big congratulations to Denise on her well-deserved promotion."

In addition to her professional involvement, Denise participates in the Take Stock in Children Program through the Education Foundation of Collier County.

"Denise is the ultimate team player, an extremely valuable asset to our team and the firm's future success. A big congratulations to Denise on her well-deserved promotion." — **BRIAN MALLETTE** | HBKS Principal and Senior Financial Advisor



# HBKS® 2023 Promotions



**Ethan D. Berkebile, CFA, CAIA**  
HBKS Portfolio Manager

**P**ortfolio Manager **Ethan D. Berkebile, CFA, CAIA**, is a Senior Investment Analyst working with the Asset Management Group in the HBKS office in Pittsburgh, Pa. He contributes to HBKS client portfolio construction by leading the firm's efforts to source, underwrite, and monitor investment managers. He also works with the firm's advisors on the customization of portfolios for the firm's largest clients and frequently presents research to the Investment Policy Committee.

Prior to joining HBKS in 2022, Ethan spent more than seven years in portfolio management and investment research where he was responsible for sourcing and underwriting managers and strategies across traditional and alternative asset classes. He is a cum laude graduate of Saint Francis University School of Business where he double majored in finance and economics. He earned the Chartered Financial Analyst designation in 2019 and the Chartered Alternative Investment Analyst designation in 2023.

"Ethan's promotion to Portfolio Manager is well deserved," noted Chief Investment Officer Brian Sommers. "His expertise and hard work has made him an invaluable member of the AMG and we are excited for Ethan to continue to help us develop an expanding set of solutions for our clients."

Ethan is active in his industry sector, a member of the CFA Institute, CFA Society of Pittsburgh, and the Pennsylvania Chapter of the CAIA Association.

"Ethan's promotion to Portfolio Manager is well deserved. His expertise and hard work has made him an invaluable member of the AMG and we are excited for Ethan to continue to help us develop an expanding set of solutions for our clients."

— **BRIAN SOMMERS** | HBKS Chief Investment Officer