



FORTUNA WEALTH



An Introduction

Fortuna Wealth Welcomes You

A note from our Founder & CEO:

At Fortuna Wealth, our first priority is to make sure your financial plan is sound and is a benchmark to the decisions we make. As life is ever-evolving, our financial plan is ever-evolving and must be updated on-going to make sure your goals, wants, and wishes are being achieved. Our 5-step process makes sure that all aspects of your financial life are being looked at and the direction you are heading towards is sound. This plan then becomes the benchmark to every decision we make from portfolio positioning, risk mitigation, income generation, legacy planning, liability management, tax planning, and estate planning. Hence, it is important that we stay up to date on your situation so that we can help with your decision-making process as issues arise and thus, we can face them in a timely manner. Our home office is located at 2600 N. Military Trail, Suite # 215, Boca Raton, FL 33431. You can reach any member of our team by calling (561) 430-3399 or via email at info@fortunawealth.com. As we continue to build a strong partnership together, we fully recognize that your support and the trust that you place in us is the foundation of our success. We value this immensely.

Thank you for the confidence that you have placed in us. We look forward to growing with you!

Evan J Mayer CFP®, CRPC®, CWS®

Founder & CEO

Fortuna Wealth

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Fortuna Wealth with Raymond James | 2600 N Military Trail, # 215 | Boca Raton, FL 33431 | Tel. 561-430-3399 Fax. 561.465.3633
www.fortunawealth.com | info@fortunawealth.com

A Breadth of Services To Serve a Variety of Needs

At Fortuna Wealth, we offer a vast number of services to help you reach your personal and family financial goals. We are here to provide you with an array of financial and investment planning services essential to your success. We will work hand-in-hand with you to select the service that best suits your needs, then apply our investment insight and expertise to tailor the required service to your unique situation and with your specific goals in mind.

Services that we offer include but are not limited to:

- **Retirement Planning**
- **Tax Planning**
- **Investment Planning**
- **Banking and Credit***
- **Education Planning**
- **Succession Planning**
- **Portfolio Management**
- **Insurance with Risk Mitigation Planning**

*Banking and Lending Services provided by Raymond James Bank, a Florida-chartered bank affiliated with Raymond James Financial Services.

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Why We Affiliate with Raymond James

By The Numbers

- ▶ Approximately **8,700** financial advisors
- ▶ Approximately **\$1.17 trillion** in total client assets
- ▶ More than **2x** required total capital ratio
- ▶ Stable outlook credit ratings of **A-**, **A-** and **A3** from Fitch, S&P and Moody's

Did You Know?

Continuing its tradition of giving back, Raymond James and its associates donated to charitable organizations in 2022, including \$7.4 million to the United Way.

Raymond James was the first in the nation to publish its Client Bill of Rights, setting the standard for the industry.

Our Clients Always Come First

At Raymond James, safeguarding your assets is one of our highest priorities. It's why we offer account protection through the Securities Investor Protection Corporation (SIPC), various syndicates of Lloyd's of London (excess SIPC) and the Federal Deposit Insurance Corporation (FDIC).

Protecting Your Privacy

More than 1,000 Raymond James professional associates work exclusively in information technology and security management. From technological safeguards to employee policies and operating procedures, we maintain constant vigilance where your privacy is concerned.

Technological Security

Our technological systems are continuously monitored for signs of tampering or unauthorized activity. We employ cutting-edge firewall and antivirus technology, as well as specialized programs to prevent and detect intrusion. We also maintain strict controls to limit and monitor employee access to systems.

Regulatory Compliance

As a registered broker/dealer, Raymond James is subject to the rules and regulations of the U.S. Securities and Exchange Commission (SEC), the Financial Industry Regulatory Authority (FINRA) and the Municipal Securities Rulemaking Board (MSRB), as well as the securities exchanges to which it belongs.

Raymond James actively manages its compliance with regulatory entities daily. In addition, those agencies strictly enforce compliance standards, which are also audited annually by an independent public accounting firm.

Account protection applies when a SIPC-member firm fails financially and is unable to meet obligations to securities clients, but it does not protect against market fluctuations. Investment products are: Not deposits. Not FDIC or NCUA Insured. Not guaranteed by the financial institution. Subject to risk. May Lose Value.

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Our Promise to You

As a practice that puts clients above all else, we want you to have the highest level of confidence in doing business with us at Fortuna Wealth. The integrity, strength, and stability at the foundation of our practice offer the most important protection for your accounts, and we back our efforts with a pledge you can believe in.

Fortuna Wealth Mission Statement and Promises:

“We strive to be your Financial Quarterback on all important financial decisions”

Fortuna Wealth and its associates take seriously the trust and faith that our clients put in us. Here are some key promises we make to you:

1. We will ALWAYS act in your best interest. No thought or decision will be made without that key principle. We will always hold ourselves to a fiduciary level of care. As a CFP® professional, Evan has a legal and ethical standard that is taken very seriously.
2. All decisions and advice are predicated on our seven wealth management issues and with all of these in mind. (These issues include but are not limited to: Retirement Planning, Tax Planning, Investment Planning, Banking and Credit, Gift Planning, Succession Planning, and Insurance with Risk Mitigation Planning.)
3. Comprehensive Financial Planning will be the cornerstone to all the decisions we make. These plans will be updated regularly, as without proper data, our advice cannot be accurate. It is imperative that a financial plan is done so our advice is precise to your situation and needs.
4. We have a duty of confidentiality to our clients. This means we cannot share your information, discussions, or any scope of our relationship with anyone else without your express consent. (Unless required by law)
5. We will be transparent and truthful at all times. This means sometimes we will say things that would be very direct or candid. Our goal is to make sure we are advising you to the best of our capabilities.
6. We strive for phenomenal customer service and communication. We mandate that all clients, regardless of assets under management, feel as if they are our #1 client. That means always calling back right away and always keeping you informed of decisions and strategies we make.



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About Evan



Evan J. Mayer, CFP®, CRPC®, CWS®
*Founder and CEO, Fortuna Wealth
Financial Advisor, RJFS*

As the founder and CEO of Fortuna Wealth and a financial advisor with Raymond James, Evan applies his 20-plus years of industry experience to provide his clients with customized, holistic financial planning geared toward their unique lives and goals.

Evan focuses on guiding clients through all of life's phases, from implementing investment strategies designed to address their long-term goals to their day-to-day needs in retirement or on their way to retirement. To provide clients with the best possible support as they pursue their long- and short-term goals, Evan follows a disciplined process of assessing each client's financial picture, determining their risk tolerance, and then building and executing an investment plan designed to align with their specific needs. As they move forward, he regularly monitors their plans and periodically meets with them to review their portfolios, assess their goals, and makes adjustments whenever necessary to help ensure they remain on track to achieving their objectives.

Evan is a CERTIFIED FINANCIAL PLANNER™ professional, showing his dedication to meeting the CFP Board's continuous education requirements and practicing with high ethical standards. A distinguished advisor, Evan is also a Chartered Retirement Planning CounselorSM and a Certified Wealth Strategist.

Another testament to Evan's knowledge and hard work, Evan was named to the 2023 edition of the Forbes list of Top Best-in-State Wealth Advisors. Evan was also named to Advisor Hub's Top 50 Solo Practitioners List in 2022. Additionally, Bank Investment Consultant magazine named him in their Top 100 Bank Advisors annual listing in 2016, 2017 and 2018* prior to Evan going independent. Prior to joining Raymond James in 2019, Evan served as senior vice president and financial advisor with The Mayer Group at SunTrust Investment Services.

Evan is a native of Coral Springs, Florida, and a graduate of Bellevue University. He loves spending time with his wife Lauren, their two daughters Bryce and Dylan as well as their son Hunter. Evan makes it a point to squeeze in a round of golf whenever possible. He is also active in his community through fundraisers, education, and social causes.

* Bank Investment Consultant: To compile the list, multiple variables were combined into one composite score. The six categories used are: (1) assets under management; (2) trailing-12-month production; (3) percentage increase in AUM from the previous year; (4) percentage increase in T-12 production; (5) amount of fee business; and (6) the ratio of production-per-AUM. (Note: 2018 AUM was defined as the amount an advisor had as of Aug. 31, 2018. Likewise, for T-12 production, the 12-month period ending Aug. 31, 2018 was used.) The nominees were ranked by each of the six categories and then six different scores were calculated based on where they ranked. Those six scores were used to compile the final list. The ranking may not be representative of any one client's experience, is not an endorsement, and is not indicative of advisor's future performance. Neither Raymond James nor any of its Financial Advisors pay a fee in exchange for this award/rating. BIC is not affiliated with Raymond James.

† The Forbes Top Wealth Advisors Best-in-State 2023 ranking, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone and in-person due diligence interviews, and quantitative data. This ranking is based upon the period from 6/30/2021 to 6/30/2022 and was released on 4/4/2023. Those advisors that are considered have a minimum of seven years of experience, and the algorithm weights factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their practices and approach to working with clients. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Out of approximately 39,007 nominations, 7,321 advisors received the award. This ranking is not indicative of an advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. Neither Raymond James nor any of its Financial Advisors or RIA firms pay a fee in exchange for this award/rating. Raymond James is not affiliated with Forbes or Shook Research, LLC. Please visit <https://www.forbes.com/lists/best-in-state-wealth-advisors/7sh=181ba856a997> for more info.

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About Noah



Noah S. Wills, CLTC[®], CPFA[®]
*Assistant Vice President, Fortuna Wealth
Financial Advisor, RJFS*

Noah Wills is a Financial Advisor that joined Fortuna Wealth in February 2023. Prior to joining Fortuna Wealth, Noah was with Lenox Advisors in NYC for the past 4 years. Noah focuses on guiding clients through all of life's phases, from implementing investment strategies designed to address their long-term goals to their day-to-day needs in retirement or on their way to retirement. To provide clients with the best possible support as they pursue their long- and short-term goals, Noah follows a disciplined process of assessing each client's financial picture, determining their risk tolerance, and then building and executing an investment plan designed to align with their specific needs. As they move forward, he reviews their plans and periodically meets with them to review their portfolios, assess their goals, and makes adjustments whenever necessary to help ensure they remain on track to achieving their objectives.

Noah earned his degree from The Pennsylvania State University Main Campus finishing with his Bachelors in Science in Information Sciences in technology. Noah also spent time as an analyst for the Penn State Investment Association. He is currently a part of the Penn State Alumni Association (NYC Chapter), as well as the Boca Raton Chamber of Commerce. He holds FINRA Series 6, 7, 63 and 65 registrations, life and health insurance licenses, and is both a Certified Long Term Care Consultant designation (CLTC[®]) and a Certified Plan Fiduciary Advisor (CPFA[®]).

Noah is a native of Rockland County, NY. He recently moved down to Boca Raton, FL. Noah enjoys golf, The NBA, and being an avid film critic.

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About Anny



Anny D. Paulino
*Senior Vice President
Operations Manager
Fortuna Wealth
Registered Client Services Associate, RJFS*

Anny strives for excellence in serving our clients and assisting our team on a daily basis. She is fundamental to the financial planning process, handling many of the data gathering and monitoring portions. Anny takes care of the operational needs of our team, and assists clients with any questions or requests they may have in a timely and efficient manner. Anny enjoys fostering close relationships with the families and individuals we serve, and helps ensure that they receive the highest level of attention and support. Her follow-up is key to our clients and to the successful relationships we have with them.

Anny also manages a wide range of administrative matters, from account maintenance and service requests to our client communications. Empathetic and detail-oriented, her goal is to always make working with us easy and effortless.

Before joining our team in 2015, Anny was an Investment Associate at SunTrust Investment Services, Inc. She holds a bachelor's degree in communications from Florida International University. Anny currently resides in Hollywood, Florida, where she spends her free time at the beach and with her family.

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About Mokshada



Mokshada Nookooloo
*Assistant Vice President
Client Services Manager
Fortuna Wealth
Registered Client Services Associate, RJFS*

Mokshada Nookooloo is a Client Services Manager that joined Fortuna Wealth in February of 2023. Prior to joining Fortuna Wealth, Mokshada was with PFS Investments for the past 6 years as an advisor. Mokshada focuses on assisting the advisors on the client service side by ensuring client satisfaction and accurate data collection.

Mokshada attended the University of South Florida. She got her FINRA Series 6,26,65,63 and life and health insurance license by the age of 19.

Mokshada was born in Mauritius, a small Island on the Southeast coast of South Africa. She enjoys working out, dancing, cooking, baking and going on adventures with her dog.

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