CAPITAL VIEW INVESTMENT GROUP

Advisors with D.A. Davidson & Co. member SIPC

Quarterly Newsletter

D|A|DAVIDSON

Family Legacies Merge to Launch New Beginnings

Greetings and Happy New Year to you, our friends and clients! We hope you had a wonderful holiday season and were able to enjoy some quality time with the important people in your life.

2021 continued to be a season of change across the world in terms of the pandemic, the economy, markets and even closer to home among our own investment team. Effective October 1, 2021, the Capital View Investment Group was created by incorporating three of the members of the Hansen Investment Group and complementing them with three new team members.

Mark Hansen, Brad Hansen and Renee Chase remain as half of the core unit of this new team – but we would like to provide a little background on our additional team members, so that you may get to know them better.

Brad Thurber joined D.A. Davidson in 2000 and loves connecting with and guiding clients throughout their financial journey. An exceptional listener, he is passionate about his clients and the markets. As a second-generation financial advisor with over 20 years of experience, he feels well qualified to help clients achieve their financial goals. Brad graduated from Brigham Young University in 1997 with a Bachelor of Science in Finance and obtained a Master of Business Administration from the University of Montana in 2006. He is a CERTIFIED FINANCIAL PLANNER™ (CFP®) and also serves as the Branch Manager of all three D.A. Davidson offices in Utah.Brad grew up and spent the first decade of his career in Montana, but has lived in and worked in Salt Lake City since 2010. Brad and his wife, Amber, have three kids: Braxton, Kyah and Logan. When Brad isn't at work, he loves to coach his kids in various sports, including football and basketball.

Drew Morin joined D.A. Davidson in June 2019, becoming the first third-generation financial advisor with the firm, following in the footsteps of his grandfather, mother and uncle (Brad Thurber). Drew's passion for people, coupled with his analytical skill set, benefit both his clients and the team. He serves as an advisor and planning specialist. Prior to joining the firm, Drew obtained his Master of Business Administration from the University of Utah. Before attending graduate school, Drew was a client relations and marketing analyst with an institutional investment firm, Wasatch Advisors, in Salt Lake City. Prior to that, Drew worked for JPMorgan Chase & Co. as a personal and relationship banker. Drew completed his undergraduate studies at BYU-Idaho, where he earned a Bachelor of Science in Business Management. He also has earned the Certified Wealth Strategist® (CWS®) certification. In his free time, he enjoys running, boating and playing music.

Erin Lui joined D.A. Davidson in 2018. As a registered associate and branch operations manager, she assists clients with various service requests on their accounts and supports the team with a number of administrative items. Erin provides exceptional customer service, is always on-the-ball with requests and projects, and does it all with a smile on her face. Prior to joining D.A. Davidson, Erin worked as an equity trader for Alpine Securities and as a stock plans senior financial services representative at E-Trade Financial. She holds a Bachelor of Arts in Art History from the University of Utah. In her free time, Erin enjoys spending time with family, hiking, drawing, watching movies and is an avid Utah Jazz fan.

We are excited about this new team and believe it will enable us to provide you, our valued clients, with expanded financial planning capabilities, increased specialization and improved accessibility. Thank you for the trust you have placed in us to help you manage your financial needs. We appreciate the opportunity to work with you. Wishing you the very best in 2022!

Mark Hansen, CRPC®, CWS®
Financial Advisor,
Portfolio Manager

Brad Thurber, CFP®
Senior Vice President,
Financial Advisor,
Portfolio Manager,
Branch Manager

Drew Morin, CWS®
Financial Advisor

Bradley Hansen, CWS®
Senior Vice President,
Financial Advisor,
Portfolio Manager

Renee A. Chase
Senior Registered Associate

Erin Lui
Registered Client Associate

110 South Regent St., Suite 100 | Salt Lake City, UT 84111 | (801) 333-3140 | (888) 334-3140
www.capitalviewinvestmentgroup.com