ONE WEALTH

# ONE WEALTH ANNOUNCES STRATEGIC TEAM EXPANSION

*One Wealth, a National Registered Investment Advisor (RIA) and Financial Planning Firm, is excited to share the expansion of its team.*

Over the past year, we have continued to thoughtfully and strategically grow our team in support of our clients and our long-term vision. Building on several key hires made last year, we are pleased to announce additional team members joining us in 2026, further strengthening our capabilities across operations, client experience, investment analysis, trading, and strategic execution.

In mid-2025, we were excited to welcome Nadine Makarem as Operations & Service Associate and Olivia Sherwood as Client Experience and Marketing Specialist.

Nadine has worked closely alongside our Chief Operating Officer, Marium Sohail, supporting day-to-day business operations while helping uphold the firm's vision and operational standards. Her role is instrumental in enabling our advisors and associates to focus on what they do best, delivering exceptional service and outcomes for our clients.

Olivia brings a fresh perspective and valuable experience to the firm, playing a key role in enhancing how we engage with and support both clients and advisors. Her focus on client experience, communication, and marketing effectiveness helps ensure consistency, clarity, and a high-quality experience across every touchpoint. Working closely alongside CEO and Founder Jeremy Dicker, she will focus on delivering the best overall experience to our clients.

We are pleased to be working alongside Josh Miller as our Qualified Benefits Specialist. With over a decade of experience in qualified plans, Josh brings extensive expertise in tailored 401(k) management and employee benefit strategies. In this role, he will work closely with our team and clients to design, implement, and manage those retirement plans that align with both organizational goals and individual participant needs, ensuring compliance and optimal plan performance.

Looking ahead as we start 2026, we are pleased to announce the addition of Michael Donoghue, CFA, as Portfolio Analyst and Senior Trader, joining the firm on February 1st. This role significantly enhances our investment team by deepening our analytical capabilities, strengthening risk management, and improving execution precision.

As part of our ongoing commitment to enhancing client experience within our insurance group, we are thrilled to welcome Samantha Heagney to One Wealth as our Client Service Associate.

ONE WEALTH

# ONE WEALTH ANNOUNCES STRATEGIC TEAM EXPANSION (Cont.)

Samantha will support both existing and new clients by assisting with their ongoing insurance needs and ensuring a high level of service and care.

We are honored to have Danny Shannon, of Impruve, join One Wealth as our Fractional Chief Technology Officer. An experienced engineering leader, Danny has held CTO and senior engineering roles, guiding product strategy, system architecture, and execution. In this capacity, he will assist our leadership in technology decisions, oversee development and vendor partnerships, and help ensure our systems support the firm’s long-term growth.

Additionally, One Wealth announces that longtime employee Thomas Hughes was promoted to Chief Financial Officer. After working alongside the executive team for the past seven years, he has been a trusted associate and key contributor to our firm’s success. This change formally recognizes the strategic business oversight, financial leadership, and operational impact he has long provided to the firm.

Notably, we are delighted to welcome Brandi Dicker back to the firm as Director of Strategic Initiatives. Brandi has supported the firm in countless ways over the years and we greatly value her experience, insight, and deep familiarity with our mission and goals. In this role, she will support special initiatives, client events, and a range of cross-team projects, working closely with the executive committee to advance key priorities and strategic endeavors.

At One Wealth, we remain committed to our core values: integrity, attention to detail, system and process-driven execution, results focus, accountability, and *Kaizen*; the discipline of continuous, thoughtful improvement in every action, every process, and every relationship.

As we grow our team, these principles guide everything we do and ensure we continue delivering excellence together. We are proud of the continued growth of our team and grateful for the talent, dedication, and expertise each individual brings to the firm. These additions position us well as we continue to evolve, innovate, and deliver exceptional value to our clients.

***“We're thankful and honored to have such dedicated, accomplished financial professionals choose to continue their careers with One Wealth,”***
says Jeremy Dicker, Founder and CEO.

For more information or interview requests, please contact:
Marium Sohail
Chief Operating Officer
concierge@onewealthmgmt.com
310-899-3162