



Newsletter



Turning the Page at Align

Janel Cross | December 2025

It is my pleasure to recognize a truly special milestone for Align Wealth Strategies. After more than forty years of dedicated service in this profession and countless relationships built along the way, Jim Werst, our senior advisor and my trusted partner, is retiring.

Jim has not only helped guide so many individuals and families towards their financial goals, but has also shaped the culture and heart of our firm. Even if you have not worked with him directly, every member of Align is touched by his example of care, integrity, and genuine connection. I'm honored to introduce Jim's own words below as he reflects on his career and his next chapter. On behalf of everyone at Align, we thank Jim for his tremendous impact and wish him every happiness in retirement.

Closing a Chapter

Jim Werst | December 2025

I write this message with mixed emotions. I'm excited to be entering a new chapter of life, one that many aspire to reach during their working years. At the same time, I feel both sadness and deep satisfaction as I step away from a career that has been so rewarding, one that allowed me to share in the lives and successes of so many wonderful people.



When I earned my first paycheck as a 15-year-old, 55 years ago, I never could have imagined the career that lay ahead. I'm so grateful to have found my way into financial services, and especially the role of Financial Advisor. My love of numbers no doubt came from my father, an engineer, while my enjoyment of connecting with people was a gift from my mother, she was a talker! Those traits have served me well over my 40-year career. ►



The most difficult part of retiring will be missing the wonderful meetings with all of you! It was always like getting together with friends. I never looked at it as work, it was fun! Although, there were periods when the markets didn't cooperate. Being in the office fielding panicked phone calls wasn't always enjoyable, but it was necessary. As I look back on these times, they were probably the most important conversations of my career, and I am so glad I was there to have them!

Now, as I look to the future, I reflect on all the business decisions I have made. One of the best decisions I could have ever made was to partner with Janel Cross to build Align Wealth Strategies. As we began this journey to build Align, we had similar interests - to build a firm where teamwork would be crucial to our operation. With help from our talented staff and advisors, we have built a tremendous team!

I am so proud to be part of this team and what has been built. I have said on numerous occasions, "I wish I was 20 years younger to get to enjoy the future successes I know are coming". We have such a wonderful group of people here at Align and I am convinced they will collectively be able to serve you better than I ever could by myself. I wish them all the best as they partner with you on your life's journey to help you to reach your goals!

The Next Chapter

While Jim is beginning a well-deserved retirement, we are grateful that he will continue to share his wisdom and insight with us as a consultant to Align's Investment Committee. His ongoing involvement will help us continue to uphold the high standards our clients expect. We look forward to future chapters together, and thank Jim for helping build the foundation we stand on today. ■





THANK YOU FOR THE GREAT PRIVILEGE OF SHARING THE FINANCIAL JOURNEY WITH YOU!

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