

July 31, 2023

CSCPAs

Causey Streeter, CPAs, LLC

Dear Valued Client,

“Not finance. Not strategy. Not technology. It is teamwork that remains the ultimate competitive advantage, both because it is so powerful and so rare.”

— Patrick Lencioni, *The Five Dysfunctions of a Team: A Leadership Fable*

And so, it is in this spirit of optimism, growth, and excitement that we announce the merger of our two firms –

Cagle Financial Advisory, LLC has merged with Justin D. Streeter, and his Team into ***Causey Streeter, CPAs*** on *Friday, June 23, 2023*.

Over the past year, we have worked diligently to ensure that this merger will result in key benefits to all our clients, and we are thrilled to share some of these details with you now. Monte and Justin have known each other for several years through ongoing Continuing Professional Education, and other social events.

In addition to merging our two practices, Monte has occupied new space in East Cobb, conveniently located across from Johnson Ferry Baptist Church in the Crossings Center Office Park.

A bit about Justin Streeter: Justin Streeter is a Certified Public Accountant with 26 years of professional accounting expertise with both businesses and families. In addition to being a tax professional, Justin owns and operates a successful Private Wealth Advisory practice with Ameriprise Financial, offering financial planning, insurance, and investment management, and Estate Planning. Justin’s deep bench of knowledge can help all his clients, regardless of need or life stage and he enjoys being their “go to” financial quarterback. This is because Justin not only understands the investment world, but also the tax ramifications that come along with it. He is always thinking about the **tax alpha** and how it will impact your goals. Justin is grounded by his deep faith and believes that one of the greatest gifts you can give to the world is helping people live up to their potential.

Justin’s Tax team includes his wife Leigh, who serves as Practice Manager for CSCPAs, LLC, as well as Kristine Accetta, CPA, Senior Manager, Won Divergilio, CPA and Christie Klosowski, Admin.

John, Pat, and Heather focus their attention on his financial planning practice – *KeepWatch Wealth Partners*. KeepWatch Wealth Partners has offices in Alpharetta, Macon, and Montclair, New Jersey.

As always, we are resolved to provide a high level of customer service and stand ready to help you at any time. Our goal is to ensure that you feel confident in your financial future through our in-depth

analytics and focused, forward-thinking tax planning. If you have any questions, please do not hesitate to call us at (678) 831-4539 (for Justin) or at (770) 973-4100 Thank you in advance for the continued confidence you place in us and for the opportunity to serve you and your family.

Sincerely,

Handwritten signature of Justin D. Streeter in black ink.

Justin D. Streeter, CPA, CTS™, CFP®, PFS
Certified Public Accountant

Certified Financial Planner®

Personal Financial Specialist

Certified Tax Strategist™

1150 Sanctuary Parkway, Ste 410
Alpharetta, GA 30009
678.831.4539

Handwritten signature of Monte F. Cagle in blue ink.

Monte F. Cagle, CPA/PFS, CFP®
Certified Public Accountant

Certified Financial Planner®

Personal Financial Specialist

1000 Johnson Ferry Rd, Ste D-110
Marietta, GA 30068
Either 470.563.9188 or 770.973.4100