Center Street
CAPITAL ADVISORS

NEWSLETTER

ISSUE 11 | APRIL 2026

Welcome Message from CEO

Dear Center Street Capital Advisors Community,

As we move through 2026, the momentum across Wells Fargo Advisors Financial Network (FiNet) – and within Center Street – is undeniable.

This year marks Wells Fargo FiNet's 25th anniversary. This milestone prompts reflection on its storied history and stirs excitement for its bright future. While many are just now taking notice, driven by recent recruiting successes and the depth of the platform, the foundation was built over decades. **According to John Tyers, President of FiNet, there were 320 advisors on the platform in 2002. Today, it has grown to nearly than 2,600 – over 8% compounded annual growth.**

Importantly, that growth wasn't linear. There were periods of slower momentum, even years when recruiting trailed what we now see in a single quarter. So why the surge now?

Experienced advisors are demanding more – control over their businesses, flexibility in how they operate, and greater participation in the economics they create. They want equity, tax efficiency, and succession options, all while maintaining access to the resources of a major firm. FiNet delivers on that balance.

The industry shift is clear. Where wirehouses once dominated growth and attracted the largest teams, that dynamic has changed. **In Q1 alone, FiNet out-recruited other channels within Wells Fargo Advisors, as noted by President John Tyers – and we expect that trend to continue.**

At Center Street, that momentum is translating into real results. We recently surpassed $8 billion in client assets under management, a meaningful milestone that reflects the trust our advisors and clients place in us. We are also proud to have contributed to FiNet's success, including the addition of Bauman Wealth Management to our New York City office.

The recent opening of our Madison Avenue location in the heart of Midtown is another important step forward – an investment that reflects our confidence in the model and the partnership with Wells Fargo leadership in New York City.

We are seeing strong expansion opportunities across all of our existing markets, along with new ones on the horizon. This is not a moment – it's a sustained shift, and we are well positioned to play a leading role.

Thank you for being part of our continued growth.

Mark Klein

CEO, Center Street Capital Advisors

Mark Klein
CEO

In This Issue...

#investedinyou

$8 BILLION AND GROWING

As we approach our four-year anniversary, the pace and scale of our growth continue to exceed even our own expectations. We set out with ambition – but what we've built together has been *truly remarkable.*

BY THE NUMBERS

2022: 5 Advisors and just over $1B in AUM ⏵⏵⏵ 2026: 38 Advisors and more than $8B in AUM

Today, we are nearly 60 people strong, supported by a dedicated leadership team, in-house transition expertise and robust operational and compliance infrastructure – all fueling continued momentum.

What began as an idea – launched before construction was even finished in our first office in Chatham, NJ – has evolved into four thriving locations, powered by an exceptional group of professionals across the firm.

We are proud of what's been accomplished, but even more excited about what lies ahead. Most importantly, we are deeply grateful – for the trust, confidence and partnership that have made this journey possible.

FIVE CSCA FA'S EARN NOTABLE RECOGNITION

CONGRATULATIONS! | 2026 Award Recipients

Center Street
CAPITAL ADVISORS

Stephen Jurist
Senior Managing Director/Partner

Gary H. Wayne, CFP®
Managing Partner/Co-Founder

Andrew Wayne
Managing Partner/Co-Founder

Bryan Drowos, CFP®, CPWA®
Managing Director/Partner

Robert Green
Managing Director/Financial Advisor

We're proud to share that five of our advisors have been named to the **2026 Forbes-Best-in-State Wealth Advisors list.**

While we see firsthand the dedication, expertise and client commitment they bring every day, it's especially meaningful to see that excellence recognized on a national stage.

2026 Forbes Best-In-State Wealth Advisors; Awarded April 2026; Data compiled by SHOOK Research LLC based on the time period from 6/30/24 – 6/30/25 (Source: Forbes.com). The Forbes Best-In-State Wealth Advisors rating algorithm is based on previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

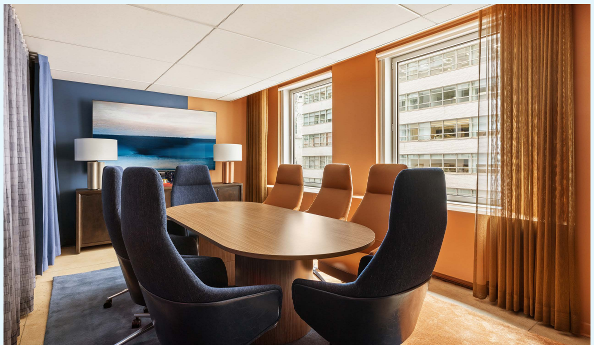
NYC IS NOW OPEN FOR BUSINESS

After what felt like an eternity of sharing vision boards and progress updates, the wait is finally over – our new Manhattan office is open. Center Street is proud to announce that 485 Madison Avenue is now home to our NYC-based team.

This space, brought to life by Center Street's real estate and design team, was truly a labor of love. Every detail was thoughtfully considered – from top-tier finishes and furnishing to functional modern amenities, including two conference rooms, a comfortable team lounge and a wellness room featuring a massage lounger.

The result is anything but a typical financial services office – and that's exactly the point. Our investment in Midtown reflects strong confidence in our partnership with local Wells Fargo leadership and provides a compelling, elevated option for advisors looking to take their business upmarket.

Photos and a full video are available on our website, www.CSCA.com.



LET'S TALK ABOUT IT...AI IN THE WORKPLACE

BY MARK KLEIN

When I started in the financial services business in the late 90's, the internet was roaring onto the stage and penetrating every aspect of life. Wall Street gave an instant premium to any company that added ".COM" to their name and could track how many people visited their site. In fact, the "E" in "PE Ratio" was jokingly thought to stand for "eyeballs".

This was also the time when Stewart, the popular, tattooed and quirky character in Ameritrade's TV ads, was used to emphasize the ease of low-cost, online trading. Naysayers called for the end of traditional financial advice as the industry was going to move to cheaper, do-it-yourself alternatives. My 22-year-old mind thought my career may have been over before it even started!

The world today feels somewhat similar as AI adoption continues to flourish. Note: Online advice did not replace the need for a trusted Financial Advisor and AI is not going either.

Agentic AI Adoption is real and all firms and institutions need to Embrace AI to create efficiencies, reduce headcount and increase the speed of advice delivery.

Just last month, at **Future Proof's** Citywide conference on Miami Beach, Anthropic asset and wealth management head **Peter Nolan** said advisors are 'the last role' that would be replaced by AI. *"That's because you have the relationships and you have trust."* AI will be a tool that augments the profession so advisors can focus more on deepening personal connections.

What is a Financial Advisor to do? Get back to basics and ensure you have tight client relationships. An older advisor once told me, *"If you haven't had coffee with a 'client' in their kitchen, they are not really your client."* If you don't know the next generation, make that a 2026 priority. Are you reaching out on birthdays? Are you leveraging marketing programs to keep your name in front of people? Do you call at least quarterly? Meet at least annually? Send year-end gifts or holiday cards? These can be the difference-makers and no matter how much agentic computing power is thrown at people, it will never be enough to break up strong relationships.

THE NEXT CHAPTER

Every transition begins the same way: with energy, urgency, and a bit of uncertainty. Day One brings excitement – but also the reality that you've stepped out of a familiar environment and into something new that must be rebuilt with intention.

In the early days, progress comes in waves. Client conversations are encouraging, accounts begin to transfer, and momentum builds – but rarely as quickly as you'd like. At the same time, everything feels different: systems, workflows, even the small comforts of familiarity. That tension is part of the process.

The key is simple, but not easy: get comfortable being uncomfortable and trust the process.

Successful onboarding is not accidental – it's the result of disciplined preparation and a proven transition framework. While recruiting paints a compelling vision of what's ahead, the real work happens in the details: mapping assets, navigating product portability, and anticipating client-specific needs. Even with meticulous planning, surprises are inevitable. Some clients you expect to follow may not, while others exceed expectations – often consolidating additional assets along the way.

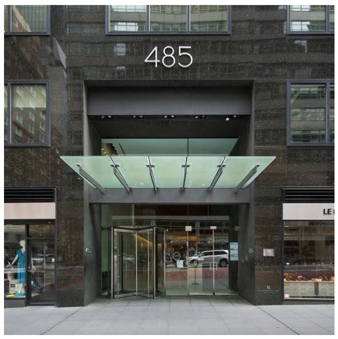
Through it all, mindset is the differentiator. Every transition follows a similar arc, and so does the outcome. Around the 45-day mark, as the pace intensifies, it's worth pausing to reflect on what's been accomplished. The results are tangible, the foundation is in place and the hardest part is behind you.

You made the move with intention and for good reason! Before long, the focus shifts from rebuilding to accelerating. Defense transitions to offense with a focus on the opportunity that lies ahead.

Chatham, New Jersey

Boca Raton, Florida

Cary, North Carolina



New York, New York

Is your town next?

> If you want to win the marathon, the universe hands you running shoes. Not the trophy.
>
> *- Freek van Litsenburg*

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About Wells Fargo Advisors Financial Network. For more than 25 years, Wells Fargo Advisors Financial Network, the independent contractor business model of Wealth & Investment (WIM), has offered financial advisors more control, flexibility, and growth around business ownership as well as support from one of the nation's largest financial institutions. WIM provides financial products and services through various bank and brokerage affiliates of Wells Fargo & Company. Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC, Member SIPC (WFAFN), a registered broker-dealer and non-bank affiliate of Wells Fargo & Company. Any other referenced entity is a separate entity from WFAFN.

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