BEARING POINT
CAPITAL

Bearing Point Happenings

3Q 2026

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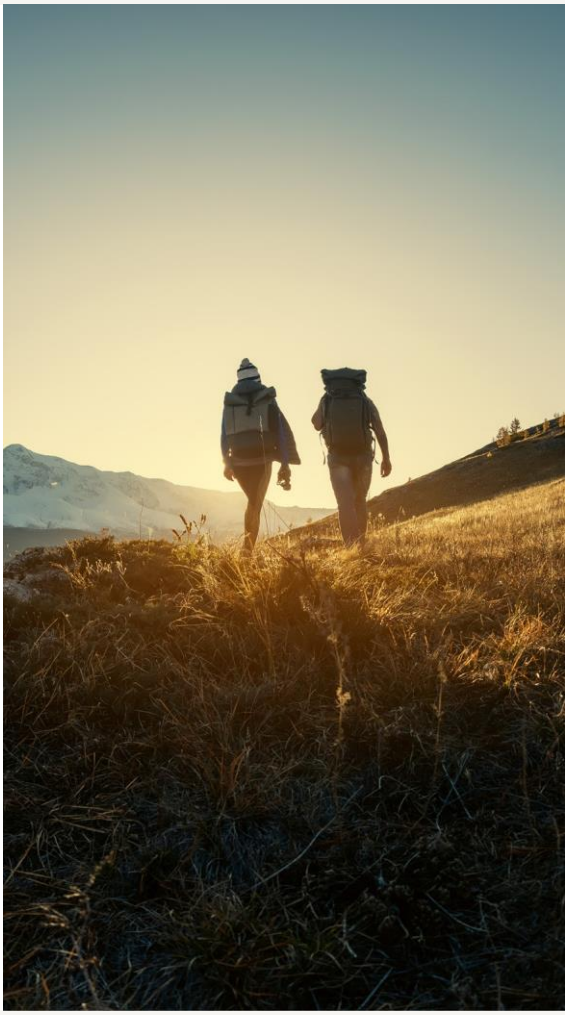

Company Corner

Dear Friends and Clients,

As summer begins to give way to fall, we're reminded that change is a natural part of growth. The changing seasons bring new opportunities, fresh perspectives, and renewed energy. The same is true at our firm.

Over the past year, our team has continued to grow, evolve, and strengthen our ability to serve clients. As we look ahead, we are excited to share several important developments that reflect who we are today and where we are headed tomorrow.

Most notably, Bearing Point Capital is becoming Bearing360 Wealth.

While our name is changing, our mission remains exactly the same: helping individuals, families, and their related business entities navigate life's complexities with thoughtful advice, disciplined planning, and long-term partnership. The new name better reflects our comprehensive approach to wealth management and our commitment to providing guidance across every aspect of your financial life.

In addition to our new name, you will begin to see several other exciting changes:

- **New Website: www.bearing360.com (soon to launch!)**
  - Our new website is scheduled to launch during the third week of September. The site offers a modern design, enhanced resources, and a better experience for both current and prospective clients and their outside advisors.
- **Updated Contact Information**
  - As part of our transition to Bearing360 Wealth, you will see updated contact information and branding across our communications. While our look may be changing, our commitment to responsiveness and personal service remains unchanged.
- **Continued Growth of Our Team**
  - We are pleased to welcome several new team members who bring additional expertise and capacity to better serve our clients. Their talents strengthen our ability to deliver exceptional planning, investment management, and client service.

Company Corner

Celebrating with Clients

One of the greatest privileges of our work is the relationships we build with our clients. This year, we had the opportunity to connect and celebrate with many of you.

- **Second Harvest Heartland** – In June, members of our community joined us at Second Harvest Heartland to pack food boxes for families across Minnesota. It was a meaningful reminder of both the need and the impact we can have together.

Thank you to everyone who joined us. These gatherings remind us that the relationships we share extend well beyond financial planning and investing.

Company Corner

On a Personal Note:

- Doug Dirks recently welcomed his first granddaughter Olivia Rose!
- The Smith Family welcomed a new English Springer Spaniel, Prairie Rose Kalifornia Wildfire ("Kali" for short), to the fold. She's 17 months old and heading to hunt camp to learn some manners!!
- Julie had a close encounter with the fury kind on a recent trip to Northern Minnesota. Probably looking for a picnic basket.
- Jama continues to train for the Twin Cities Marathon in October! Wish him good luck!

Olivia Rose

Julie's Bear Encounter!

Kali

Meet the Team: Mark Rosenkranz

In each Company Newsletter, we'll introduce you to members of our team and give you a glimpse into the people behind Bearing360 Wealth.

This month, we're pleased to spotlight **Mark Rosenkranz**, his professional background, expertise, interests, and the role he plays in serving our clients.

Mark earned his degree in **Finance and Quantitative Economics from the University of Minnesota** and is a **CFA® charterholder**. He enjoys learning about each client's unique background, financial goals, and dreams, then helping build and execute a plan designed to achieve those objectives.

Mark lives in Bloomington with his wife, Molly, and their three daughters, Alma, Lila, and Lydia. Outside of work, he enjoys golfing, biking, and learning Spanish. He is also a board member at Normandale Community College.

A few fun facts about Mark:

- His favorite music is alternative, and his most recent live concert was the Red Hot Chili Peppers.
- His favorite travel destinations include New York City and Hawaii.
- Some of his favorite dishes are chicken skewer tacos, curry butternut squash soup, and Campanelle pasta with broccoli, bacon, and breadcrumbs.
- During college, he worked as a **Zamboni driver for the Gopher hockey team**.

Welcome Mark! Thrilled to have you onboard!

Looking Ahead

We have tremendous momentum as we move toward 2027. Between the launch of Bearing360 Wealth, the growth of our team, new resources for clients, and continued investments in technology and service, the future has never looked brighter.

Most importantly, none of this would be possible without the confidence and trust you place in us. We are deeply grateful for the opportunity to serve you and your family, and we look forward to continuing that partnership for many years to come.

Warm regards,

The Soon-To-Be Bearing360 Wealth Team

Bearing Point Capital

Whether you're in need of individual financial counsel or robust institutional strategies, we've built our business to address the varied needs of our diverse clientele.

Our smallest and largest clients deserve our full attention, and we deliver that attentiveness with guidance that's tailored to your unique challenges and objectives. We take the time to get to know your values and long-term goals, carefully crafting plans that support the future you're working toward.

As a focused and experienced group, we provide the resources and expertise of a large firm, with the consideration and service typically found at a small boutique. We develop strategies with an emphasis on mitigating risk and pursuing long-term success, fortified by thorough, objective investment research and selection.

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