



Gerard R. Cayer
CPA, MST

Mark V. Caccia
CPA, MST

Donna T. Caccia
CPA, MST, CFP™

December 2023

Dear Valued Client:

We wish you the very best this holiday season. We appreciate your trust in us and value our continuing relationship.

There are exciting changes taking place at Cayer Caccia on January 1. For more than 30 years, we have led a team of highly skilled professionals helping you plan for your future. Cayer Caccia is also preparing for our future. Donna and Mark are transitioning from their daily responsibilities as partners to become working associates, while maintaining a strategic advisory role with both their clients and the Cayer Caccia team.

As a founding partner, Jerry will continue to lead the day-to-day operations. Senior associates Geri Bennett, who has been with us for more than 23 years, and Yvonne Chita, who joined us eight years ago, will expand their roles within the firm, stepping into the roles Donna and Mark held as partners.

We're grateful we can make this seamless transition, knowing that the talent we have nurtured these many years provides the continuity that will successfully lead us into the future.

Working with a team that knows and understands you is what makes our relationship so valuable, and we remain committed to providing the personalized service you have come to expect from the team you already know and trust.

We look forward to our continued relationship and a wonderful New Year.

A handwritten signature in blue ink that reads "Jerry".

Gerard R. Cayer

A handwritten signature in blue ink that reads "Mark".

Mark. V. Caccia

A handwritten signature in blue ink that reads "Donna".

Donna T. Caccia