Tiell
FINANCIAL GROUP
EST. 1995

Volume 18 Issue 1 Summer 2026

COMMUNITY SHRED DAY

Please join us for our Annual Community Document Shred Day on **Friday, June 12th from 9:00 AM – 1:00 PM** in the parking lot of Tiell Financial Group!

This is a great opportunity to safely and securely dispose of sensitive documents. Our team will take care of unloading your vehicle for you! Items can be brought in boxes, bags, or totes, just let us know what you'd like returned. To help keep things running smoothly, please remove all non-shred items such as binder clips and paper clips before you arrive.

As a thank-you for participating, we'll be giving away vouchers to enjoy a treat from IC Treats-N-Things!

Not sure what to bring? Here's a quick guide to how long you should keep common documents:

Keep for 1 Year or Less:
Bank statements (unless needed for taxes)
Pay stubs (once matched to your W-2)
Utility bills

Keep for 3–7 Years:
Tax returns and supporting documents
Medical bills (especially for insurance or tax purposes)
Records of major purchases or expenses

Keep Indefinitely:
Birth certificates & Social Security cards
Wills, trusts, and estate documents
Property records and deeds
Investment and retirement account records
Marriage/divorce certificates

We look forward to seeing you there and helping you clear out your clutter, safely and securely!

FRAUD AWARENESS SEMINAR - COMING SOON!

We're currently planning a fraud awareness seminar for late summer/early fall and are looking forward to bringing this important topic to our clients and community. We hope to once again welcome a representative from the FBI or Attorney General's office, along with a panel of individuals who will share their personal experiences with fraud to help others stay informed and protected.

We'll be announcing more details soon via social media and email. If you'd prefer to receive the date by phone or regular mail, please call our office at 419-937-2879.

ON-SITE ATTORNEY SERVICES

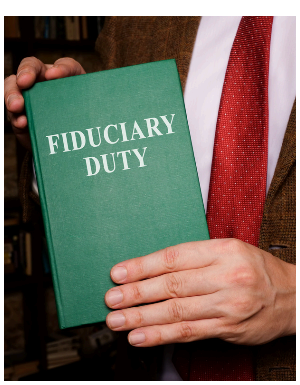
We're excited to be partnering with a local attorney to offer monthly, on-site estate planning services in our office. This includes support with wills, powers of attorney, trusts, and more, all in one convenient location.

If you're interested in taking advantage of this opportunity, please call 419-937-2879 and ask for Amanda.

EMPLOYEE SPOTLIGHT: ELIZABETH CHARLTON

Next up on our employee spotlight is our Paraplanner, Elizabeth Charlton! Elizabeth joined Tiell Financial Group in February 2024, bringing over 16 years of experience and a passion for building strong, lasting client relationships. She is committed to delivering excellent customer service while also staying actively involved in the Tiffin community, supporting local activities and causes that make a meaningful impact. Outside the office, Elizabeth enjoys crafting, traveling, and supporting the Ritz Players. She and her husband, Aaron, have called Tiffin home since 2000, where they raised their three children and built a network of family and friends. Over the years, she has been involved in organizations such as PTO, Boy Scouts, and 4-H, and now that their children are pursuing their own paths, Elizabeth and Aaron are enjoying more opportunities to travel and explore together.

WHAT DOES "FIDUCIARY" REALLY MEAN?



In the investment world, you've probably been hearing the word fiduciary more and more. It's become a bit of a buzzword, but it is important. A fiduciary is an advisor who is required to act in your best interest when giving financial advice. That means recommendations should be based on what's right for you, not on commissions, incentives, or convenience.

For us, being a fiduciary means putting your goals first, being thoughtful and transparent in our recommendations, and helping you make decisions with clarity and confidence.

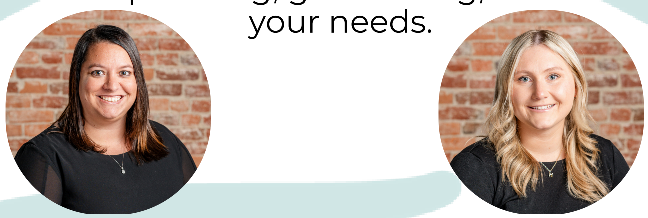
If you ever have questions about what that means for you, we're always happy to talk.

WE'RE HERE TO HELP!

Not sure who to contact? You're not alone, we get that question a lot! This guide will help connect you with the right person. Our entire team is always here to help, but each of us brings unique areas of expertise to best support you.

ADVISORS (KIT, DEBI, DEXTER (MEDICARE), ANDY, ALAINA, DILLON)
YOUR PARTNERS IN PLANNING

For financial guidance and big-picture decisions, your advisor is your go-to. They can help with investment strategies, retirement planning, goal setting, and overall financial advice tailored to your needs.



CLIENT SERVICES (AMANDA, MIKAYLA)
YOUR DAY-TO-DAY SUPPORT TEAM

For account-related requests and routine needs, Client Services is here to help. Contact them to schedule appointments, request withdrawals or contributions, update beneficiaries, or make general account changes.

NEW BUSINESS / PARAPLANNER (JENNY, ALLISON, ELIZABETH, LINDSAY)
GETTING THINGS STARTED & KEEPING THEM MOVING

For questions about opening new accounts, money transfers, or preparing for upcoming meetings, our paraplanner team is here to support you behind the scenes and ensure everything is in place.

TAX (LEESA, REBECCA)
HELPING YOU STAY PREPARED

Have questions about your tax return or need help with tax documents? Our tax team can assist with tax-related inquiries, document requests, guidance & tax preparation.

OPERATIONS (SARAH)
KEEPING EVERYTHING RUNNING SMOOTHLY

For general inquiries, event questions, or anything you're not sure where to direct, our operations director is happy to assist or connect you with the right person.

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OFFICE HOURS

MONDAY - FRIDAY
8AM - 5PM

FIND US ON FACEBOOK & INSTAGRAM!

PRSRT STD
U.S. POSTAGE
PAID
TIFFIN, OH
PERMIT #52

Happy Holidays

HOLIDAY CLOSURES

MEMORIAL DAY:
MAY 25

INDEPENDENCE DAY:
JULY 3

LABOR DAY:
SEPTEMBER 7

THANKSGIVING:
NOVEMBER 26
NOVEMBER 27

CHRISTMAS
DECEMBER 24
DECEMBER 25

NEW YEARS
JANUARY 1

At Tiell Financial Group, we strive to be your premier advisor by providing holistic wealth planning tailored to your wants and needs.

It is our goal to be proactive in an ever-changing environment, provide excellent client service, and make every choice according to the highest level of ethics. We endeavor to always be doing the next right thing.

Has it been a while since you've sat down with us? Call to schedule your annual review!
419-937-2879

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