

The Tiell Financial Team



Debi



Kit



Dexter



Sarah



Christi



Amanda



Leesa



Andy



Trenton



Mikayla



Jenny



Volume 15 Issue I

Summer 2023

2023 EVENTS

SHRED DAY

Saturday - June 17, 2023

9AM - 1PM

Tiell Financial Group Office

Bring your documents to be securely shred on site! Pull behind the building, and we will unload your car for you. We will be handing out coupons for ice cream at IC Treats!



CLIENT APPRECIATION DAY

Sunday - August 6, 2023

Doors open at 2PM

The Ritz Theatre - Tiffin, OH

Invitations will be sent through the mail soon - We are thrilled to announce our entertainment: from fabulous Las Vegas— Comedian Mike Hammer!

You won't want to miss this one!

Coming Soon:

- ♦ **Special Needs - in partnership with Dell Burtis Law, STABLE and National Care Advisors**
- ♦ **Estate Planning - in partnership with Dell Burtis Law**
- ♦ **Social Security / Medicare**
- ♦ **Tax Seminar - to be held early 2024**

Event details will be announced by email and on Facebook. If you do not have access to these, please call the office so that we can notify you directly of events.

Continuing Education

Throughout the year, we attend conferences, roundtables and seminars to learn from industry experts and bring this knowledge back to the office to better serve you! Here's a round-up:

ConnectED - October 2022 in San Antonio. Debi, Kit, Andy & Trenton spent 3 days completing continuing education, meeting with economists, and listening to important updates.



W Forum - February 2023 in San Diego. Debi, Sarah, Christi, Amanda, Mikayla & Jenny attended this event focused on the growth of women in the financial industry. This event had a focal point on wellness, and the ladies brought back seminar ideas, attended workshops, and met with like minded professionals.

AssetMark Gold Forum - February 2023 in Scottsdale. Debi & Kit attended this premier event which brings together unbelievable content with unmatched experiences and networking. From motivational insights to actionable ideas, Gold Forum is focused on tapping into a limitless mindset to garner new opportunities.



AssetMark Premier Advisor Meeting - Debi, Kit, Andy & Trenton attended this one day course in Detroit in May. They discussed ways we can better serve you amongst many other relevant and timely topics.

If you have an account with AssetMark, we are thrilled to announce that a mobile app for their platform is coming this year!

Employee Spotlight



Trenton Z. Burns
Financial Advisor & IAR

Our next featured employee is: Trenton Burns!

Trenton joined our office in 2021, as a New Business Coordinator, and has since transitioned to the role of Financial Advisor and Investment Advisor Representative (IAR).

Trenton is currently pursuing his MBA with a focus in Finance, with plans to graduate this fall from Bowling Green State University. He holds Series 7 & 66 Registrations, as well as Ohio Insurance License.

In his free time, you can find Trenton outdoors: golfing, fishing or hiking. He is an avid Ohio State and Cleveland sports fan.

About the U.S. Banking System

With recent headlines about failed U.S. banks and their ripple effect throughout the banking sector, we want to summarize the latest information on this evolving event. We continue to monitor the situation closely.

On March 10, 2023, Silicon Valley Bank (SVB), the 16th-largest bank in the U.S., headquartered in Santa Clara, California, failed. SVB's customers include small to mid-sized technology companies and private bank customers, some of which are individuals.

On Monday, March 13, 2023, The FDIC transferred all deposits—both insured and uninsured—and substantially all assets of the former SVB to a newly created, full-service FDIC-operated 'bridge bank' in an action designed to protect all depositors of SVB. As a result, depositors will now have full access to their money. In addition, customers will be made whole on their deposits through FDIC insurance fees that FDIC -member banks pay to have their customers' deposits insured up to \$250,000.

FDIC Insurance covers: checking/savings accounts, money market deposit accounts, and certificates of deposit up to applicable limits. FDIC does not protect investments or crypto assets.

The SIPC offers limited protection to investors, by protecting securities, mutual funds, bonds and cash in a brokerage account up to \$500,000. SIPC does not protect against market loss.

Recent market volatility serves as a reminder of the importance of maintaining a diversified investment portfolio that considers a client's risk profile and time horizon. We've taken these factors into account when establishing and maintaining your portfolio. However, should you have concerns, please call our office anytime.

CrossFit Offering Legends Program



There's an old saying... health is wealth! CrossFit Tiffin is proud to offer a new program called Legends. The 45 minute class focuses on improving health and vitality for those 50 and older. Classes include use of cardio equipment and light weights. The program is \$75 a month. For more information, please call CrossFit at 419-556-6964 or visit <https://crossfittiffin.com>.

Polar Bear Jump

Thank you to everyone who donated towards the 2023 Tiffin Polar Bear Club Jump held at Camden Falls on February 4th.

With your generosity, we were able to donate \$16,095 to FACT of Seneca County!

Sarah Whaley started the day off by sharing her son Connor's cancer journey.

Next year's jump is tentatively scheduled for February 3, 2024.



**TIELL FINANCIAL
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Office Hours
Monday - Friday
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& INSTAGRAM!**

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Holiday Hours

Closed for Memorial Day
Monday, May 29th

Closed for Independence Day
Tuesday, July 4th

Closed for Labor Day
Monday, September 4th

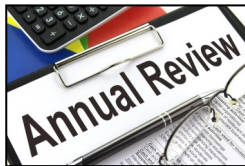
Closed for Thanksgiving
Thursday, November 23rd
Friday, November 24th

Closed for Christmas
Monday, December 25th

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 customer service, and make every choice according to the highest level of ethics. We endeavor to always be doing the next right thing.

Securities and Investment Advisory Services offered through **Woodbury Financial Services, Inc. (WFS)**, member FINRA/SIPC. **WFS** is separately owned and other entities and/or marketing names, products or services referenced here are independent of **WFS**.



Has it been a while since you've sat down with us? We suggest that you make an appointment annually to review your accounts.

Please call us to schedule at 419-937-2879.

www.tiellfinancial.com