

The Tiell Financial Team



Kit



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Mikayla



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Volume 16 Issue 1

Summer 2024

Ground Breaking Ceremony Recap

On April 24th, a very brisk Wednesday afternoon, over 100 friends, families, clients, and dignitaries gathered to celebrate a significant milestone: the ceremonial groundbreaking for our future office. Located conveniently down the street from our current office, on the lot once occupied by the decommissioned St. Patrick's Church, this new space marks our commitment to Bascom for generations to come.

We are ecstatic to share this journey with you and plan to keep you updated on the progress of the building through email, social media and newsletter publications. It was a great pleasure to have some of our valued clients join us for the groundbreaking, and we are deeply honored by your support. Our dedication to community involvement remains steadfast, and we aim to honor the legacy of the Church through our new establishment.

A heartfelt thank you extends to Clouse Construction, The Seneca Regional Chamber of Commerce, Kendra's Cookies, and High Voltage Coffee for their contributions to making this event a success.

Stay tuned for updates!



Photos By: The Seneca Regional Chamber of Commerce



2024 Shred Day

Come join the fun at our 15th Annual Community Shred Event!

Date: Friday - June 14, 2024

Time: 9:00 AM - 1:00 PM

Location: 5941 W Tiffin St, Bascom (our office)

Pull around our building, and our friendly team will take care of unloading your vehicle. Want your bags, boxes, or totes back? Just let us know! Before you swing by, make sure to remove any binders or paperclips. Each participant will receive a coupon that can be used at IC Treats-N-Things and can be redeemed Friday June 14th through Sunday June 16th.

Here's a general guideline for how long you should keep various types of documents before destroying them:

Tax Returns and Supporting Documents:

Keep for at least 7 years. This includes returns, W-2s, 1099s, receipts, and other supporting documents.

Bank Statements:

After reconciling with your monthly statement, you can generally dispose of them.

Pay Stubs:

Keep for 1 year. Once you've confirmed that your pay stubs match your W-2 form, you can discard them.

Credit Card Statements:

Keep for 1 month. Unless needed for tax purposes or proof of purchase, you can typically discard them after ensuring there are no discrepancies.

Utility Bills:

Keep for 1 month. Once you've confirmed payment and there are no discrepancies, you can dispose of them.

Insurance Policies:

Keep for the life of the policy plus 3 years.

Investment Annual Statements:

Keep for as long as you own the investment plus 7 years.

Property Records:

Keep for as long as you own the property, plus 7 years after selling. This includes deeds, titles, and mortgage documents.

Legal Documents:

Keep indefinitely. This includes birth certificates, marriage licenses, divorce decrees, and wills.

Medical Records:

Keep indefinitely. These records are important for medical history and insurance purposes.



Employee Spotlight



Mikayla McKinniss
Client Services

Our next featured employee is: Mikayla McKinniss!

Mikayla joined Tiell Financial Group right out of college in 2021 in our Client Services Department.

She is a graduate from the University of Findlay, holds an Ohio Insurance License, is a 2023 Graduate of Leadership Seneca County, and is a notary public!

In 2023, Mikayla said "I do" to Colin McKinniss, adding a dash of romance to her already impressive resume. When they're not busy adulting, you can catch them cheering on sporting events, trying new restaurants or spoiling their fur babies, Beau the basset hound and Lulu the labrador.

AssetMark Updates

If you have an account with AssetMark, you may have already received an email or letter in the mail detailing updates to your account.



As part of our ongoing commitment to enhancing our services and providing you with the best possible experience, we are implementing several improvements to better accommodate your needs. These enhancements will allow us to expedite requests and streamline our current processes. Additionally, we are pleased to inform you that these changes will result in reduced pricing for you. Rest assured, your accounts will remain with AssetMark, and there will be no interruption in service. To process this update, we will require your signature.

The initial request was sent to all clients who have an email on file. For those who do not have an email or do not complete the request within 21 days, the documents will be sent to you via regular mail.

As always, if you have any questions, please feel free to contact our office at 419-937-2879.

Congratulations Jenny & Bart!

April 8, 2024 marked a memorable day for our area, as we experienced a Total Solar Eclipse. Adding to the magic, Jenny Harris exchanged vows with her fiancé Bart Lombardy during the moment of totality! Heartfelt congratulations to Jenny & Bart on this joyous occasion!



**Mark your calendar for the event of the year...
our 2024 Client Appreciation Day!**



Date: Sunday, September 8th

Time: Doors open at 2 PM, Event kicks off at 2:45 PM

Location: The Ritz Theatre, Tiffin, Ohio

Entertainment: Get ready to laugh with ComedySportz!

Keep an eye on your mailbox because invitations will sent out soon!

Polar Bear Jump

Thank you to everyone who donated towards the 2024 Tiffin Polar Bear Club Jump held at Camden Falls on February 3rd.

With your generosity, we were able to donate \$16,650 to FACT of Seneca County! Thank you!

TFG Jumpers: Amanda, Allison, Brad (Sarah's husband), Kit, Bryce (Allison's fiancé) & Jenny.



**TIELL FINANCIAL
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Office Hours
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Holiday Hours

Closed for Memorial Day
Monday, May 27th

Closed for Independence Day
Thursday, July 4th

Closed for Labor Day
Monday, September 2nd

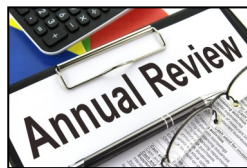
Closed for Thanksgiving
Thursday, November 28th
Friday, November 29th

Closed for Christmas
Tuesday, December 24th
Wednesday, 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 **Osaic Wealth, Inc.** member FINRA/SIPC. Osaic is separately owned and other entities and/or marketing names, products or services referenced here are independent of Osaic.*



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