



Mahurin Wealth Advisory Team



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Financial Consultant

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Matthew Garrett, CFP®
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Fall of 2017 Quarterly Newsletter

As summer comes to a close, before the trees change colors, and the leaves start to fall, our team would like to take an opportunity to reflect on the summer season and thank all of our clients for your continued support and trust that you place in the Mahurin Wealth Advisory Team. The fall is a beautiful time of the year; football, cool weather, and the start of a new school year. Best wishes to all of the children and young adults who have started back to school.

Hilliard Lyons Trust Company, LLC

Hilliard Lyons Trust Company, LLC (HLTC) provides asset management as well as sophisticated trust and estate planning services to a wide array of high net-worth clients and institutions. HLTC has been serving client's fiduciary needs since 1984. They are the largest state-chartered trust company in Kentucky and one of the larger regional trust companies in the country. With administrative offices in Cincinnati, Ohio, and Indiana, they continue to expand into new locations allowing Hilliard Lyons to provide personalized wealth management services to our clients.

Although the HLTC home office is in Louisville, Kentucky, the Mahurin Wealth Advisory Team remains active as the relationship manager. In this role, we are able to draw on the expertise of the trust company and other home office professionals from a variety of disciplines to address our client's various needs.

An overview of Hilliard Lyons Trust Company, LLC and their services:

Investment
Services

Trust & Estate
Administration

Estate Planning

- Over \$9 billion in client assets
- Over 50 trust professionals including individuals holding CFP®, CFA®, and CTFA® designations.
- Our professionals have an average of 22 years of industry experience and 12 years with Hilliard Lyons.

Hilliard Lyons 2017 National Forum

Hilliard Lyons hosted our bi-annual National Forum August 16th through 18th in Louisville, Kentucky. Financial Consultants from all over the Hilliard Lyons footprint were in attendance. It was announced this year's event had a record number of participants in attendance. The National Forum allowed an opportunity to share best practices with financial consultants and learn from home office experts on the tools available to better serve our clients. The keynote speakers included; Archie Manning, General Michael Hayden, and Susan O'Malley. Those who attended heard from Hilliard Lyons CEO

and President about the history and culture of the firm and the focus moving forward, as we continue to work with the firm's most important asset, our clients. Each Financial Consultant spent time attending workshops learning new tools, technology enhancements, market research and outlooks, estate planning ideas, and client service opportunities. Matthew Garrett had this to say about the event, "I really enjoyed the

opportunity to network with my peers within Hilliard Lyons. The opportunity to hear ideas from other Financial Consultants and different ways to utilize our home office experts is invaluable".



The Great American Solar Eclipse Bowling Green, KY August 21, 2017

"WOW!", "Look at that!", "Isn't that amazing?"

Those are just a couple of the remarks that were made while our office enjoyed the total solar eclipse on August 21st. It was a great opportunity to share in the historic event together. Pictured is: Shannon Vitale, Gwen Reynolds, Sandra Riehn, Kelsey Cooksey, Casey Birge and Matthew Garrett.



Employee Spotlight Gwen Reynolds Registered Client Service Associate

What brought you to Bowling Green?

I moved to Bowling Green two weeks after graduating from Centre College to start working at Bowling Green Bank & Trust in the Trust Department.

Tell us about your family.

I have been married to my husband, Brett, for 20 years. We have two sons – Will (15) and Cooper (12). We also have a spoiled rotten dog named Dodger.

Have you traveled anywhere fun this summer? If so, where?

I traveled to Rosemary Beach, FL with some of my best girlfriends and traveled to Baltimore, MD to visit my sister. I am looking forward to our family vacation in October.

What are you most looking forward to this fall?

I am looking forward to cooler evenings so we can build fires on our patio. I am also looking forward to watching college football.



Community Involvement Spotlight of the Quarter The Salvation Army



The Salvation Army operates 7,551 centers in communities across the United States. These include food distribution, disaster relief, rehabilitation centers, anti-human trafficking efforts, and a wealth of children's programs. There are currently 23 Salvation Army locations in the state of Kentucky that provide assistance to children, adults, and families in need. The Bowling Green location offers a variety of services such as: hot meals, emergency shelter, food boxes, and disaster relief and worship services. On average, +250 meals are served daily and 80-100 individuals utilize their shelter services every night.



Photo courtesy of BG Daily News

Our very own, Bob Kirby has served on the Salvation Army board of directors in Bowling Green for 43 years. He has served the non-profit as board chairman, campaign chairman, and in various other capacities. In 2016, Mr. Kirby was awarded the *Partner in Mission Award* for being instrumental in growing the mission of The Salvation Army. Additionally, Financial Consultant Mac Jefferson, has also served as board chairman and in several other executive and sub-committee positions.

From its inception, The Salvation Army has relied heavily on the support from the community to further its mission. Whether it is donating money, time, or items to one of their local stores, find out how you can support The Salvation Army:

www.salvationarmybowlinggreen.org

Hilliard Lyons: Our response to Hurricane Harvey



Hurricane Harvey Relief

Our thoughts are with the tens of thousands of people displaced by Hurricane Harvey. Hilliard Lyons is supporting the victims of this catastrophic hurricane and tropical storm by contributing funds to the American Red Cross. The American Red Cross is working around the clock along the Gulf Coast to help those that have been devastated by the storm. The Hilliard Lyons Foundation has stated it will match up to \$15,000 in funds contributed by employees.

Find out in what ways you can help the victims of Hurricane Harvey through the American Red Cross:

<https://www.redcross.org/donate/hurricane-harvey>

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