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HL Financial Services, LLC
Board Member
Senior Vice President
Wealth Advisor

Shannon Vitale
Wealth Advisor

Robert Kirby
Wealth Advisor
Trust Officer Emeritus

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AAMS®, CWA®
Wealth Advisor

Matthew Garrett, CFP®
Wealth Advisor

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Sandra Riehn
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Spring of 2018 Quarterly Newsletter

Spring has sprung! As the winter weather changes to warmer temperatures, Hilliard Lyons will be getting a new look. Over the next few weeks, we will change our logo and reveal our new brand positioning, which better reflects the optimism, confidence, and passion that have always been a part of our story. While you will begin seeing our new logo, website, and title changes over the upcoming weeks, rest assured that your relationship with Hilliard Lyons will not be affected in any way, and our firm ownership remains unchanged. Our team is looking forward to working with you as the year progresses.

Shred your important documents in our office

The best way to protect yourself from identify theft is to discard important documents properly.

Stop by our office between **April 16th – 27th** and have your documents professionally shredded. LandShark Shredding Company will destroy all of your documents on-site confidentially.



Important Reminder for 2017 Taxes

In early 2018 clients may receive **two** 1099 forms per account. A Hilliard Lyons 1099 form before conversion and a First Clearing Corporation 1099 form post conversion.

Please make sure that you have both documents when you file your 2017 taxes. If you have questions or need assistance please let our team know and we would be happy to assist.

Financial Planning

Comprehensive Solutions for Complicated

Americans are now facing perhaps the largest financial challenges of their lives. For most, this new challenge brings new choices. How are you facing the challenges? What choices are you making to ensure you and your family are prepared to meet future needs?

At Hilliard Lyons, financial planning is integral to our relationship with you. A financial plan from Hilliard Lyons is a working document that can be as flexible, or as focused, as you wish. It is not an end unto itself – it is not just a document that occupies space on a shelf. A good financial plan is a well-conceived evaluation of your needs and goals that is regularly monitored and updated with the guidance of an experienced Hilliard Lyons Wealth Advisor.

Our Wealth Advisors provide you with guidance and support, plus the tools to act upon your plan. We are committed to building a long-term relationship with you by devising goal-oriented solutions to meet the financial challenges you face and finding the investments that best serve your needs.

Hilliard Lyons' comprehensive financial planning analysis is specifically designed to assist you in charting a course of action to pursue your financial goals in such critical areas as:

- Retirement Income Strategies
- College Education funding
- Risk management, including life, long-term care, Disability insurance needs.
- Estate preservation
- Charitable giving
- Successful investment management
- Business succession planning
- Debt Management

Put Your Financial Picture into Focus

It is as true for financial and investment matters as it is for life in general; planning for the future helps you focus on where you are headed and feel confident in where you stand in relation to your goals and intentions.

Our commitment to helping you plan effectively, invest wisely, and create a realistic financial course to your future.

The Envision® planning process offers you and your wealth advisor the tools and technology you need to discuss your life expectations, decide on an appropriate investment strategy, track your progress and re-sync – or rethink – your approach whenever necessary.

Contact your Hilliard Lyons Wealth Advisor to initiate your financial plan.

Employee Spotlight

Pete Mahurin

Congratulations Pete on 50 years with Hilliard Lyons!



Pete currently serves on the Board of Directors for Hilliard Lyons Financial Services, LLC, Hilliard Lyons' Parent company. He is a Wealth Advisor in the downtown Bowling Green office. Pete has been with Hilliard Lyons since 1968 and has been among the top Wealth Advisors every year since 1972, having been the number one Wealth Advisor for nine of those years.

He graduated from Western Kentucky University in 1961 with a Bachelor of Arts in Chemistry. He also received an Honorary Doctorate in 2009 from Lindsey Wilson College. In 2011, Pete was awarded WKU's Philanthropist of the Year. In the spring of 2017, Western Kentucky University dedicated the Honors College to the Mahurin family naming it the "Dixie and Pete Mahurin Honors College". Pete is a Board Member for Houchens Industries, Albany Bancorp, Cecilia Bancorp, Jackson Financial, and Gray Construction and has served as a board member of the Tennessee Valley Authority. Pete is married to Dixie and they have a daughter, Sarah, and a granddaughter, June Caroline.

Tell us about yourself?

I am a country boy from Grayson County who ended up in a great business. I started keeping up with the markets when I was in college and I found it fascinating! People with my background at the time, weren't usually hired.

What is the biggest challenge you have faced in this industry?

The toughest part about this job is getting started. There are many possibilities and you just have to feel your way through. When I first started, I worked with commercial banks in the area, most don't exist anymore. I gradually started moving to other kinds of business.

What is your piece of advice for someone starting out in this industry?

First, you really need to learn about investing. I think today people do an inadequate job about understanding how to evaluate an investment. Second, make sure you always do what is best for your clients. Work hard to find people who truly need investment advice.


Casey Birge, Intern

Congratulations Casey!

Casey Birge has been an intern in our office since October 2015. She will be graduating from Western Kentucky University in May 2018 with a degree in Business Administration and Organizational Leadership. She assists in the areas of operations and marketing for the office. Casey was recently selected to be a Leadership Development Consultant for Kappa Delta Sorority for 2018-2019. Starting in August she will travel and assist Kappa Delta chapters with leadership development of members, chapter recruitment and new chapter establishment.

"I'm thankful for the opportunities Hilliard Lyons has provided me. The skills I've learned during my internship has helped me grow as a young professional."

Community Spotlight



American Red Cross

The American Red Cross prevents and alleviates human suffering in the face of emergencies by mobilizing the power of volunteers and the generosity of donors.

The American Red Cross of South Central Kentucky, through its strong network of volunteers, donors and partners, is always there in times of need. They aspire to turn compassion into action so that:

- All people affected by disaster in **Allen, Barren, Breckinridge, Butler, Edmonson, Grayson, Green, Hardin, Hart, LaRue, Logan, Meade, Metcalfe, Monroe, Simpson, Taylor and Warren counties** receive care, shelter and hope;
- Our communities are ready and prepared for disasters;
- Everyone in our country has access to safe, lifesaving blood and blood products;
- All members of our armed services and their families find support and comfort whenever needed; and,
- In an emergency, there are always trained individuals nearby, ready to use their Red Cross skills to save lives.

"I have really enjoyed my time serving as a board member for our local Red Cross chapter. Our local Red Cross team does tremendous work to help individuals and families the South Central Kentucky region. I didn't realize all of the services that are offered and the enormous impact the Red Cross makes in our community until after getting involved on the board of directors. It's been a great experience and I look forward to continuing to serve."

- **Matthew Garrett, CFP®**, Wealth Advisor
Board Member since 2013



 **Run for Red 5K**
May 5th, 2018

Find out more:

[http://www.redcross.org/local/kentucky/about/local-chapters/south-central-](http://www.redcross.org/local/kentucky/about/local-chapters/south-central)

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