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Office Hours Summary

January 8, 2025

Happy New Year!

Welcome to the Team

- Cherry Phan: Operations Manager
- Maggie Knox: Client Service Specialist
- Jonathan Yokley: Client Service Specialist

February 2025 Model Changes

- Tracker
  - Replace IJR (6 BPS) with SPSM (3BPS)
  - Replace IJH (5 BPS) with SPMD (3 BPS
- Biblically Responsible Investments (BRI
  - Replace BIBL (35 BPS) with PTL (9 BPS)

Important Dates

- January 20th - Closed for Martin Luther King Jr. Day
- January 21st - Please join us for the Quarterly Market Review!
- January 27th-31st - Team travel to Bozeman, limited availability

Growth Award

Our October growth award winner is Aaron Best, founder of Best Wealth Advisory in St George, UT. Aaron had the highest Net New Assets in December. Congrats, Aaron!

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