

# **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

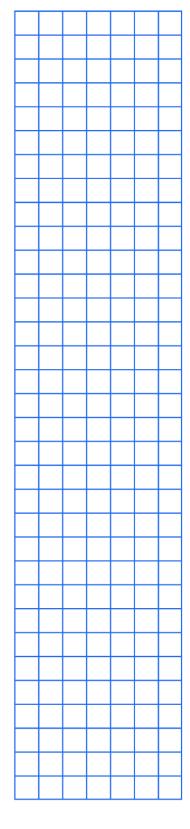
- → Tracker
  - ◆ Replace IJR (6 BPS) with SPSM (3BPS)
  - ◆ Replace IJH (5 BPS) with SPMD (3 BPS
- → Biblically Responsible Investments (BRI
  - ◆ Replace BIBL (35 BPS) with PTL (9 BPS)

## **Important Dates**

- → January 20th Closed for Martin Luther King Jr. Day
- → January 21st Please join us for the <u>Quarterly Market Review!</u>
- → 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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