



Newsletter May, 2015



May 2015, Issue 4

Dear clients and friends,

Welcome to our May newsletter, and our big news this month is the addition of Robert Wroblewski to our team as a **Client Services Representative**. His job will focus on integrating clients' needs into the big picture view. He has been employed in the financial services industry for over 9 years.

He is a Notary Public and has been a regional leader in mortgage banking. Robert has volunteered all over the world from the Republic of Georgia to Australia. Most recently he volunteered for Catalyst Miami as a tax preparer. He is also a member of the American Homebrewer Association and competed in various running events for charity. He and his wife, Ashley, enjoy travelling to foreign countries and immersing themselves in the local culture.



Robert will assist in client support including preparing and maintaining client files, reviewing financial data, and being available to reply to academic financial questions. We are very pleased to have him on board. His email is Robert@DavidTreece.com



David Treece
Investment Advisor
Representative

New Website

We have been planning a new website for a long time, and it is finally very close to completion. It has the same address---either www.DavidTreece.com or www.TreeceFinancialGroup.com We are currently filming a video for the site that introduces our firm to the general public, and we are adding many other videos on topics such as:

- Social Security planning
- Investment Strategies for Retirement
- Distributions from Retirement Plans
- Tax Management Strategies
- Five Smart Investing Principles and Five Smart Investing Strategies

Docubank has also provided us a video which we will feature. Docubank is one of the services we often use for our clients' emergency document storage and retrieval.

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Clients will have access to account information through the website.

This is consolidated account information provided through Albridge, a financial services technology firm. Even if you have accounts at different custodians, you can get a comprehensive report of all your accounts including performance information by logging in through the new website. There is a tab at the top of the screen for client access. If you are interested in even more detailed performance, we can run specialized reports for you if you just let us know what you would like to see.

ALBRIDGE[®]
AN AFFILIATE OF PERSHING

Keep in mind that you will always still have direct access to your account information by the firm who custodies your accounts. This will not change. For example, if you have accounts custodied at Pershing, you will still have access to NetxClient to view detailed account information. We work with many of the best money managers, and their performance reporting is always available, but now you can access a consolidated report or we can prepare one for you.

→MOBILE APPLICATION FOR SMART PHONES

As we are all increasingly going mobile, we also have an application you can download to access our website and account information on your portable devices such as Smartphones and Tablets.



→BLOG

We will post all of our newsletters on the website as always, and we now have a blog. Some of the best newsletter information (and other timely information) will also be posted as part of a blog on the home page.

→CALENDAR

We have done a great many activities and events lately (workshops on financial empowerment for women, social security workshops, and some smaller clients appreciation events), and we will now have them all listed on a calendar where you can register if you would like to attend.



Instagram



LinkedIn

→SOCIAL MEDIA

Our next step is Social Media, especially Twitter, Linked-in and Facebook. Treece Financial Group is currently set up on all of these social media sites, and we will now make them more useful for people who want to follow us. For example, there are outstanding economic reports, industry news, financial planning and investing information, tax tips, etc. that we create or come across, and we usually mention just one or two in a monthly newsletter. Now we will push them out on social media as well as to provide even more access. We will make sure it is worthwhile, and most importantly, we will include our own commentary and other thought leadership.

On a personal note...

Lastly, on a personal note, Luis and I are celebrating our 30th anniversary this year! How the years go by. We have planned a special vacation together, which is coming up now, so although I will be out of the office for a couple weeks, I will still be available. Thanks to all the internet and cell phone technology, I will be checking in to the office regularly, so please don't hesitate to let us know if you need anything. Marcela is a master of getting things done, so we want to make sure that you get excellent service on whatever you may need even if I am out of the office.

All the best,

David