

Updates & Announcements

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Dear Clients,

We've been working on some 'internal' business matters over the last year or so. Some of this will be news, some perhaps not, but we wanted to consolidate some announcements and explain how they benefit you.

One of the biggest is that Cornerstone now has a formal succession plan in place. While none of us (including Floyd) has plans to stop working at Cornerstone, we realized that if something catastrophic happened to one of our team members, it could negatively affect our ability to serve and provide you the guidance that we've promised. So, we formalized our succession and catastrophe planning. As a part of that change, Brett, Kelsey, and I (Nate) are now Partners. Floyd's title is now "Founder, Partner." We are excited about the change and the contingency planning that is in place to ensure our service to our friends and clients doesn't suffer if one (or more) of us aren't able to keep working.

Another major change is that we've done some internal shuffling to better focus on our mission of Helping our Clients Experience Financial Peace of Mind that Enables Them to Live Well. We now have a Director of Relationships (Brett), Director of Client Service (Tim), and Director of Operations (Kelsey). As our CEO, I am responsible for strategic planning and the overall health of the company. Floyd is responsible for our vision and culture. He plans to be active in the business for many years and will continue to mentor our team. This structure has allowed us to be more efficient in identifying and solving issues that pop up from time to time.

Almost done! Another tweak is that we have revamped our image. Our new logo is above, and our [website](#) is updated! The logo is a reminder to us of the vital importance of having a solid foundation (cornerstone) in our lives. From the 4 sides of the square we remember that:

- 1) God owns it all (we are **stewards** of what we receive)
- 2) The proper response for being a trusted steward is **gratitude**
- 3) Since we aren't ultimately the owner, we can be **generous** with our resources
- 4) Being **content** (having a sense of 'enough') empowers us to be more grateful and generous

The website updates are intended to further our calling of helping our clients be clear about their money decisions and confident that they're making wise choices with their resources (financial and otherwise). One of our goals is that every interaction you have with someone on our team would increase either your clarity of or confidence in your financial situation. If that's not happening consistently, please let us know!

As always, thank you for the privilege it is to serve you, your families, and friends.