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## Our Story

This year marks our fifth year in a partnership, and to celebrate that milestone we'd like to share the story of how it all started.

In the fall of 2007, we attended the Regional Conference in St. Louis. Some sessions included presentations from other advisors on ways to work together as a team. We both attended these sessions, and when we got back discussed a partnership as a way to better serve clients.

For the next three months we did due diligence to make sure a partnership was the right fit for our business and, more importantly, for you. We met weekly and worked from a book called, *Tested in the Trenches*.<sup>1</sup> The book contains five key blueprinting exercises to: identify core values, find meaningful purpose, create a compelling vision for the future, develop personal and professional mission statements and set specific, measurable goals. Upon completing this 12-week review, we knew we worked well together as partners. This process helped us lay a solid foundation for what has been an exceptional partnership these last five years.

Last fall we went through the process again with our Assistant, Lorelei Johnson.<sup>2</sup> By taking time to step back, reflect and reevaluate things, we gained fresh perspectives both professionally and personally. We reaffirmed our commitments to each other—and to helping you attain financial goals.

We shared our story because it is important for you to know how we arrive at our values, purpose and mission statements. We believe what we do and what we stand for makes us unique. When we give financial advice, we always remember these matters are near and dear to you. Fluctuating markets, uncertain economic issues and ever-changing world events will continue to be with us. But what is in our control is clarity of vision for our lives. Identifying what you truly want helps us gain a better understanding of how we can help you make important things happen.

Our annual review meetings and on-going communication with you are critical to this process. If we understand changes in your lives, we can continue to serve in ways that plan to fulfill your financial needs and help you move forward on your personal journey. Remember, when your values are clear, the decisions become easy.

Sincerely,

A handwritten signature in cursive script that reads "Mary Anne".

Mary Anne Smrz, CFP®  
Financial Advisor

A handwritten signature in cursive script that reads "Jason".

Jason J. Dobrzynski, CFP®, CMFC  
Financial Advisor

<sup>1</sup> Waddell & Reed, Inc. has not reviewed the book referenced herein and does not endorse the book or its content.

<sup>2</sup> Lorelei Johnson acts as a non-registered associated person of Waddell & Reed, Inc. She is authorized to assist Financial Advisors with approved activities. She is prohibited from soliciting, creating a market or account for any securities, investment advisory or insurance services. These activities are the sole responsibility of the Financial Advisors, in addition she is not authorized to enter into any contractual obligations on behalf of Waddell & Reed, Inc. or otherwise bind the firm.