

ALLEGIANCE FINANCIAL

CONNECTIONS – MARCH 2021



CHANGING SEASONS

By Laurie Rosenthal



Long-time clients Thadd and Vanessa share their perspective as they embark on the next season of their lives, retirement. We feel that during notable events like these, it's good to stop and reflect on the road traveled and share those experiences with others.

Thadd and Vanessa were referred to Betsy and Laurie over 16 years ago! They had money from the sale of a property and were ready to invest in their future. They researched on their own and attended classes from Dave Ramsey called *Financial Peace University*, yet knew they needed help from a financial professional. Finding someone they could trust and guide them along the way was important to them. Thadd and Vanessa faithfully met with Laurie and Betsy a few times a year, making adjustments throughout different life seasons and sometimes turbulent markets. Vanessa shared that she was so glad they accepted the handholding during “panic times”. Thadd shared that he had worked in the radio industry for many years and would tell his clients the importance of letting the professionals do their job.

So, now as they reflect on the past 16 years the advice they give to others is to start early, meet regularly, stay committed to time-tested financial planning strategies, and keep your dreams alive. At this point in their lives they realize how important the intangible things really are. And as we reflect on the life changes we've been through with Thadd and Vanessa we too are thankful for the intangible part of the planning we do, our friendship and the opportunity to work with such great people. Now that retirement is on the horizon, Thadd and Vanessa look forward to embarking on their new season of life and we wish them all the best!!

INSIDE THIS ISSUE

- Client Focus, Changing Seasons
- Introducing Hank Rogers, by Betsy Rogers
- Living In The Present, by Laurie Rosenthal
- Survey drawing winners
- Celebrating life together
- Referral Recognition

INTRODUCING HANK ROGERS

By Betsy Rogers



Who can resist a little more love from a fur baby? We have a fun story to share. One day around Christmastime I saw a friend's post, their dog had puppies. Those cute puppy pictures lured me in. I made the call and when I asked when the puppies could be brought home and she said Dec 23rd, I knew it was meant to be.

In the past I have been anti-pets. We had three children and very busy schedules. Of course COVID and with Reese in remote school the idea of a puppy had been brought up multiple times. I gave my best reasons as to why we do not want a dog and still the kids insisted. Well Christmas morning their puppy dream came true. After all the presents were opened, Josh went to his Dad's car where our new pup had been in hiding that morning and brought him in the house. The kids jumped to their feet mostly in disbelief, I think. (I have the video and would be happy to share if you'd like. It's a good one).

Hank Rogers, the kids decided would be his name, is truly a gift. He is a puppy and wakes us up in the middle of the night. He bites and chews on

everything. But I have to say he is a part of our family and it wouldn't be right without him. He has a really fun personality, and I am amazed at how smart dogs are. I appreciate all words of wisdom and advice when it comes to training. We are watching a lot of You Tube videos for some extra insight, and so far Hank responds quite favorably. He is a love no doubt and I am happy we have him!



LIVING IN THE PRESENT *A LESSON IN TRUE PROSPERITY*

By Laurie Rosenthal

2020 is done. We all got through it, the year with ups & downs. Those of us who like to plan learned that best-laid plans were only to be changed, delayed, or cancelled. Throughout time, people rise to challenges with optimism and ingenuity. This year was no different. I especially learned to live in the present and experience the joys of true, organic prosperity. Not external, fleeting prosperity.. but a prosperity felt deep within.

I was forced to slow down and reflect. I couldn't run constantly, I couldn't over-commit. I had to redefine personal prosperity or well-being. Time with my kids and grandkids. Time with loved

ones who were battling diseases. The ability to work. A good night's rest. A long walk in the fresh air. Learning something new. These things I learned to cherish.

A picture is worth a thousand words, right? Let me share some of my more prosperous moments over the past couple months.



SISTER (MIDDLE) HIKING W/ HS BUDDIES



SIS AND I AT A MOVIE THEATRE IN WI



ABBY, MY OLDEST GRANDBABY!

Your input is valuable to us!
At Allegiance Financial, it is our
goal to provide exceptional
service to ALL clients we serve.

Following interactions with our team, surveys are mailed to clients to learn how we did. We want to know if we've achieved our goal of providing excellent customer service. We welcome feedback and appreciate you taking the time to invest in us!

Each month we draw one winner from the collection of returned surveys. The winners receive a \$25 gift card to BJ's!

Our winners in recent months are:

Glenn G.
Cindy S.
Elizabeth W.
Richard & Linda S.
Gary & Tracy S.

Many Thanks!
Laurie, Betsy, Anna, Eddi & Marianne

CELEBRATING LIFE

Here at Allegiance Financial, we like to celebrate life together... Birthdays, milestones, achievements. We hope you are enjoying life and celebrate the good things! Betsy & Anna took some time to enjoy the fresh air of South Lake Tahoe with their kids. All smiles!





Referrals... Thank you for your trust!

Thank you to these clients who referred their friends and family in recent months! We appreciate you.

Gregory B.

David & Sandi B.

Alix P.

Loli L.

Bill & Elise G.

John & Dena J.

Lisa S.

Rui & Rose L.

JoAn W.

Ken & Debbie W.

Anna P.

Holly B.

Matt H.

Patty M.

Raymond & Denise A.

Doug & Darlene C.

Kory L.

Kris K. & Mark H.

Gary & Jan D.

Adam & Christina R.

Denny C.

Shelly W.

Craig & Cristee B.

Wil & Kathy L.

Bill & Cindy L.

Haylie M.

Chris & Jessica F.

Our normal office hours are:

8:30-4:30 Monday - Thursday

9:00-1:00 Friday

Let us know how we may best serve you!