2021

MUELLER FINANCIAL SERVICES, INC.

YEAR IN REVIEW

HIGHLIGHTS

01

EDUCATION

- Webinars & **Managing Your Wealth: Your Vision Our Guidance** Podcasts-Presented topics:
  - Environment, Social and Governance (ESG) Investing
  - Long-Term Care
  - Fiduciary Responsibilities
  - Life Insurance as a Roth Alternative

02

CLIENT COMMUNICATIONS

- Mueller Financial Services LinkedIn to share articles and company news. Connect with us!
- Launched Mueller Financial Services YouTube page
- Monthly Economic update articles
- Weekly Market Commentary articles
- Company news and updates mailings

03

TECHNOLOGY TOOLS

- Black Diamond, our wealth management platform that consolidates your financial data into one easy to use single-sign-on platform
- Virtual meetings using Teams technology with screen sharing capabilities

HIGHLIGHTS CONTINUED

04

LOGO CHANGE

The changes are subtle. Do you see them? Hint: updated font and slight color changes.

Mueller
FINANCIAL SERVICES

05

EVENTS

- Hosted client appreciation events.
- Hosted a Young Professional Networking event which we will repeat in 2022

06

GROWTH

- Acquisition of Slupik & Associates, LTD led to the integration of clients from Naperville and the addition of talented Advisors to the team.
- Sarasota based Plum and Co. acquisition led to the expansion of financial services offerings in the Florida area.
- Organic growth of the firm was key and after a 19% growth in 2020 we continued that pattern with a 25% growth of Assets Under Management (AUM) in 2021.

NEW MUELLER MEMBERS

ALEX HELMS, WEALTH ADVISOR

Alex joined the team in February and brings six years of experience in the mortgage, banking, financial services, and wealth management industries.

CRISTETA HERNANDEZ, CERTIFIED FINANCIAL PLANNER™ PROFESSIONAL, AIF®, RETIREMENT PLAN ADMINISTRATIVE SPECIALIST

Cris has experience in 401(k), 403(b), Pension, Cash Balance Plans, investment management corporate accounts and not-for-profit accounts. Cris provides administrative support working out of our Chicago office.

LISA FABRIZIUS, MBA, WEALTH ADVISOR

Lisa has over 22 years of experience in financial consulting services and economic research & analysis and is located in our Elgin office.

MACKENZIE SCOTT, FINANCIAL SERVICES ASSISTANT

Kenzie joined the Mueller Financial Services team transferring from PKF Mueller's Tax group. She handles internal processes and compliance needs and is located in Nashville.

MARY MULCRONE, MBA,WEALTH ADVISOR

Mary works closely with our Naperville clients to help them strive to maximize investment returns while managing risk and minimizing taxes.

TED SLUPIK, CERTIFIED FINANCIAL PLANNER™ PROFESSIONAL, PRINCIPAL/WEALTH ADVISOR,

Ted has served his clients for over 35 years as founder of Naperville based Slupik & Associates, LTD. He brings deep experience, industry knowledge, and a client centric focus.

VERONICA ROSHEK, RETIREMENT INCOME CERTIFIED PROFESSIONAL®, WEALTH ADVISOR,

Based in Sarasota, FL, Veronica thrives on empowering business owners and individuals with tools to gain clarity and build direction for their financial picture.

WHAT'S NEXT?

5.12.22

Mark your calendars for our Client Appreciation Event.

30 YEARS

Celebrating 30 years serving our Financial Services clients.

Curtis Wiedeman,
Long-time and valued Wealth Advisor will be entering a new life stage-Retirement.
Congratulations Curtis!

UPCOMING EDUCATIONAL PRESENTATION TOPICS

- Planning for Young Professionals
- Risk and Insurance for Business Owners
- LTC & Medicare
- Planning and Investing in a Post COVID World
- Exit Planning for Business Owners
- Women and Wealth
- Financial Planning For Young Families
- Technology Tools For Financial Planning

A Message From Our President

I would like to take the opportunity to reflect on a year that has brought challenges as we navigated back to workplace transitions but one that has demonstrated the strength of our people and our clients. The level of optimism shared by both was uplifting as we reconnected in person. Meeting new clients and deepening relationships with existing ones has been a distinct pleasure for me. Having worked with a talented team of advisors and support personnel these past two years, I know that our goal of delivering an unparalleled client experience was their focus and remains so in 2022 and beyond.

I would like to announce some exciting news regarding leadership changes for Mueller Financial Services. I will be leaving my role at Mueller Financial Services and assuming a new role as President of our separate yet affiliated firm, PKF Mueller. Rob Coursey, CPA and Partner, has accepted the appointment to President of Mueller Financial Services. Rob has been with PKF Mueller for over 22 years and is a consummate professional and leader. Please join me in congratulating and welcoming him in his new role.

Jeffrey A. Delheimer

Jeffrey A. Delheimer, CPA, President