A YEAR IN REVIEW

2020

MUELLER FINANCIAL SERVICES, INC.

2020 SUMMARY

Your Vison Our Guidance™ is not just a catch phrase we embrace. We believe in it and live it when working with our clients because it is about actively listening and offering strategic guidance to help you prepare for your financial independence.

Much has happened this year at Mueller Financial. While we experienced different work dynamics due to COVID, we adapted and our clients did too. In person meetings were not always achievable but use of meeting technology was invaluable as was the tried and true method of connecting on the phone.

Growth was achieved on many levels in many ways this year. Our AUM had double digit growth over last year. We hired additional staff. We upped our client education game by hosting numerous webinars and panel discussions. Striving to learn and stay abreast of our industry, we earned additional professional credentials this year.

We developed a new website, one that is modern, intuitive, and interactive for our clients and guests. Come take a look at www.muellerfinancialsolutions.com. Bookmark us and access your account information through our client portal. And let us know if we can make any changes that might help you navigate the site better.

This year has been challenging but those challenges have brought positive shifts in how we do business, innovation and a deeper and reflective appreciation of the opportunity to serve our client’s as their trusted advisors.

HIGHLIGHTS

- Credentialed Professionals
- Deep Experience

PEOPLE

We have deep professional experience with little staff turnover. Our professionals have over 142 years of combined advisor experience. Our quest for industry knowledge is reflected in our achieved designations:

- CERTIFIED FINANCIAL PLANNER™ - CFP®
- Accredited Financial Fiduciary - AIF®
- Chartered Financial Consultants - ChFC®
- Chartered Life Underwriter - CLU
- Certified Exit Planning Advisor - CEPA

- Achieved 19% Growth
- Hiring Talent

GROWTH

Even with the business and market interruptions that occurred this year, we experienced growth. As of 12/31/20, we have $480.13M in Brokerage and Advisory Assets, which is a 19% increase over last year. We have added to the 18 licensed states we do business in. Expansion of staff with different levels of responsibilities to assist clients occurred, and we hired a recruitment specialist to assist us in acquisition of new professionals. We are well poised for continued growth to serve our clients.

- Educational Webinars
- Partnering with Industry Specialists

CLIENT EDUCATION

Our focus on our clients this year was about outreach and education. Educational webinars were presented covering hot button topics like, post-election economic analysis, woman and wealth, COVID-19's economic impact, and key facts about Social Security. Our economic newsletters continued. And we developed a new LinkedIn profile for timely information sharing.

- Legacy Services Offered
- Services Expansion

SERVICES

Our clients have always relied on us offering our key retirement, investment, and insurance services. Our client focus in 2020 has been concentration on expansion of our services to meet our client's needs. Business succession planning, Key-Person insurance coverage, business services, planning specific to women and life transitions, and planning and investment strategies for young professionals were just part of our customized offerings.

- Technology Empowering You

TECHNOLOGY

Black Diamond is our wealth management platform that consolidates your financial data into one easy to use, single sign on platform, allowing you to see your "whole financial picture", and empowering our team to be in a better position to advise you on life's important decisions.
MoneyGuidePro® is a revolutionary digital platform which allows you to view your financial future and help tackle the 'what ifs' in life.

WHAT'S NEXT

OUR COMMITMENT

Our commitment to how we do business remains the same. We will continue our team approach and mentality and remain flexible and available to you. Most important is not only our relationship as a trusted advisor but our role as fiduciaries is to act in your best interest—<u>your</u> vision and needs are paramount.

PROACTIVITY

We work closely with tax professionals regarding investment decisions with emphasis put on tax minimizing strategies. Additionally, we will continue to be proactive about connecting with you to learn about life changes that may affect your retirement or investment goals.

ENHANCING SERVICE

We are hiring Support Advisors who become valuable team members that implement decisions reached between advisors and clients freeing important client to advisor time and resulting in more timely actions. Our focus will also be on discovering additional services that benefit our clients at every stage of their planning process.

CLIENT INVOLVEMENT

Client involvement in education on timely economic happenings will be presented in a friendly, "on your schedule" way. Educational webinars will continue. We are also launching a series of podcasts on 'hot button' financial and economic topics in 2021. And we will continue to use and train clients on technology platforms that help clients get a bigger and deeper picture of their wealth and investments.

Your Vision Our Guidance

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