Mueller
FINANCIAL SERVICES

A YEAR IN REVIEW 2022

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2022 OVERVIEW

01

30 Years of Business & Growth

Mueller Financial Services celebrated 30 years of doing business.

Closing out 2021, we grew 25% in Assets Under Management (AUM). By 2022, we were challenged with increasing inflation and volatile markets. Given these challenges, however, we remain dedicated to proactively meeting clients' needs.

Mid-year, the acquisition of a financial planning practice in Naperville led to the integration of new clients focused on a planning approach with an abundance of new options. We are evaluating additional acquisition opportunities approaching 2023.

New Team Members & Leadership

We welcomed three additional members to our team, and we are excited for you to meet them if you haven't already.

Robert J. Coursey, CPA - President

Rob was named Mueller Financial Services President, effective January 1, 2022. As President and Shareholder, he provides strategic and operational leadership to the Firm's team.

Olivia Pomerenk - Retirement Plan Administrative Specialist

Olivia joined the Firm in early October with over four years of experience in the financial services industry. Olivia is client-service-oriented. She will provide coordination and administrative support for qualified plan clients and their providers. Olivia will assist the lead advisors in the delivery of consulting and investment advisory services for the clients' qualified plans.

Brian Falls - Wealth Advisor

Brian joined us in mid-October with over 27 years of experience in the financial services industry, working directly with individuals, retail, and professional clients. Brian takes pride in understanding his clients' unique wants and needs and focuses strongly on helping them transform their financial future and pursue their personal financial goals.

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Educational Webinars & Events

Our Financial Professionals are passionate about offering knowledgeable, up-to-date, and relevant advice to our clients.

Mueller Financial Services hosted six separate webinars this year to discuss the following topics:

- The Great Retirement Income Gap
- Planning & Investing in a Post-COVID World
- Beyond 3 Key Retirement Decisions
- Financial Planning for Young Families
- Understanding Healthcare in Retirement: Medicare 101
- 2023 Market Outlook Roundtable

In addition to our educational seminars, we always enjoy our annual Client Appreciation events to further our relationship with our valuable clients.

Office Move

Our Sarasota office has a new address effective December 5, 2022. Be sure to update your records:

2601 Cattlemen Road
Suite 502
Sarasota, FL 34232

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Podcasts

This year, we successfully released 12 episodes on the *Managing Your Wealth: Your Vision, Our Guidance* podcast, discussing various financial planning topics, including:

- Creating the Optimal Team to Help Your Business Sell
- Making Lemonade Out of Lemons with Tax-Loss Harvesting
- Planning and Saving for Higher Education
- Retirement and Investing in a Post-COVID World
- Socially Responsible Investing with ESG Investments
- Financial Planning for Families
- Diversifying Your Portfolio: The Last 10 Years and the Next
- Social Security: How It Works & Claiming Considerations
- Technology and the Wealth Management Space
- Genesis Planning 101 for Young Professionals
- When to Start Exit Planning

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A MESSAGE FROM OUR PRESIDENT

I have had the pleasure of being President of Mueller Financial Services this past year, and as such, I want to take the chance to reflect on the many opportunities and challenges that this 2022 has brought to our firm and its clients.

As you know, we have been in the midst of a tough market for the past few months. Volatility has been high, and there has been a lot of uncertainty in the air.

Coming out of the pandemic, we prioritized many face-to-face meetings with our clients to reassure you that we are doing everything we can to preserve your portfolios and identify critical tax planning strategies, like tax-loss harvesting.

I know that this can be a difficult and stressful time for many of you, but please know that the Mueller Financial Services team is here for you. We remain optimistic and are committed to helping you pursue your financial goals, as well as helping to ensure your investments are positioned for long-term success. Our team is constantly monitoring the markets and making adjustments to our strategies.

As we look ahead to 2023, we will continue to share Weekly Market Updates and any other significant market information or tax-saving opportunities that may present themselves. Again, I thank you for your confidence in our qualified advisors.

Robert J. Coursey

Robert J. Coursey, CPA
President

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