Quarter 1 Newsletter

Associate Spotlight: Trish Hall, Office Manager

WOW…I have been with the Mendall Team for 3 years already! Where did the time go? I have enjoyed getting to know each of our clients and friends more and more every day.

At the beginning of 2023, I enrolled in a year-long program offered through Raymond James called STEER (**S**upporting **T**eams with **E**xcellence, **E**ducation, and **R**esources). STEER is a development program that is designed for branch associates at any stage of their career to continue learning, developing, and contributing to their team. The program will help me to specialize in subjects that best suites my role with the Mendall Team, my goals, and my interests to further my career. January was a great learning experience with the technology that is available to our office that helps enhance our efficiencies and how we can improve our client's experiences; client facing and behind the scenes. As I work through this program a few hours a week among numerous other tasks, I am looking forward to assisting my teammates with tips through this program in order to best assist our clients.

Happy Spring,

Trish

Secure Act 2.0

Passed in December 2022, the SECURE Act 2.0 includes a comprehensive set of provisions intended to help many Americans and employers with retirement saving. Many of its provisions are not detailed here, so please contact your financial advisor to see how this new legislation affects your financial plan.

Changes for investors include RMD age increases, higher catch-up contribution limits and a new 529 transferal option.

Please reach out for more detailed information.

Market Update

We know that some of the current financial headlines may be unnerving, but rest assured that Raymond James is well-prepared to weather changing or challenging market conditions. Our Chair and CEO Paul Reilly recently shared a message to our firm's advisors and associates discussing recent bank shutdowns and Raymond James' secure positioning through our prudent, client-focused management principles.

Watch video

Password: *rjstrength*

While we hope this message from Paul helps simplify what's happened in recent weeks and explain the details of our enduring strength and stability, please don't hesitate to reach out if you have any questions.

Announcements:

- ***2023 marks 75 years of The Mendall Financial Group***! Throughout our history, we have worked hard to become the team we are today to provide services within the financial industry and for our community. We thank the crew that's paved this path for us, and the team looks forward to continuing, improving, and adapting this build for years to come.

- The celebration continues as earlier this year ***MFG was named to the Forbes Best-in-State Wealth Management Teams list***. You can check out the Forbes Best-in-State Wealth Management Teams list at https://www.forbes.com/lists/wealth-management-teams-best-in-state

- During this quarter, we've celebrated the historic ***Dr. Martin Luther King, Jr., Black History Month (February)***, and currently celebrating ***Women's History Month***. Join us in celebrating the many milestones women have made in the United States within numerous courses of life.

- As of ***March 20th, at 5:24 pm EST, spring has arrived***! We hope you all have a wonderful and safe spring!

- Raymond James just recently approved the newest social media platform to our accessibility- ***Instagram***! Please find us on the app @TheMendallFinancialGroup and join our fun IG journey. Don't forget to follow us on Facebook and Twitter by searching The Mendall Financial Group.

Our best,

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2023 Forbes Best-in-State Wealth Management Teams list. Check out it here

is based upon the period from 4/1/2021 to 3/31/2022 and was released on 01/12/2023. Advisor teams that are considered must have one advisor with a minimum of seven years of experience, have been in existence as a team for at least one year, have at least 5 team members, and have been nominated by their firm. The algorithm weights factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their practices and approach to working with clients. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Out of approximately 8,000 team nominations, 2,860 advisor teams received the award based on thresholds. This ranking is not indicative of an advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. Neither Raymond James nor any of its Financial Advisors or RIA firms pay a fee in exchange for this award/rating. Raymond James is not affiliated with Forbes or Shook Research, LLC. Please see https://www.forbes.com/lists/wealth-management-teams-best-in-state/ for more info.