the MENDALL FINANCIAL GROUP LLC®

Quarter 2 Newsletter

Associate Spotlight: **Kim Mondonedo, CFP®**

After 3 grueling years of fulltime work and study, I earned a Doctor of Education (EdD) in Transformational Leadership. What I gave up during that time was exercise and socializing. Since graduating, aside from work, my biggest focus became health. It was a big transition to wind down to say the least. Have you ever used a Fitbit or heart tracking device? Well, I've used one for a few years, and it was astonishing to see how high my resting heart rate had increasingly risen over the 3 years.

I’d wanted to go hiking on the AT, but a couple things got in the way, traveling with family to St. Lucia and Alaska along with my health journey.
My biggest focus has been health and I’m currently down 41+ lbs. Now if we could just keep the stock and bond markets healthier 😊! I’ve had some great times catching up with friends and family, skiing, adopted a dog Lucy (she’s training me), had some wonderful travels, been learning a lot more about gardening and becoming more eco, cooking “clean”, and really enjoying working with our beloved clients (many of whom we’ve known for decades and even generations). I’ve been learning how to do more online outreach and creating 1–3-minute educational videos. I want to keep up with tech! If you’d like videos on a special subject, please let us know. I’ve been on the RJ National Sustainable Investment Advisory Council (#RJSAIC), and on the first ever RJ Veteran FA Network Council (#RJVFAN). I’ve been to Florida for continued education, collaboration, seeing clients, and even advising others in the industry. I send you positive thoughts and thank you for your loyalty, support, and kindness. Truly we are blessed to have such wonderful connections, a strong team, and to live in our wonderful country in an amazing state.
Ciao!

Kim

Quality-of-Life Planning

Many events over our lives often have financial implications that need to be considered and are often a catalyst for action. We offer support around many of these events to keep long-term plans intact by tackling the short-term obstacles right alongside you.
Are you dealing with a career change, death of a loved one, handling a divorce, marriage or second marriage, selling a business, or transitioning to retirement? Having emotional and financial support during these events are invaluable and we’d like to help.

For more detailed information on Quality-of-Life Planning please contact us via phone or email: 207-621-2626 // themendallfinancialgroup@raymondjames.com

Announcements:

- ***2023 marks 75 years of The Mendall Financial Group***! Over the course of our history, we have worked hard to become the team we are today to best serve 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 newest 4th generation addition to The Mendall Financial Group. Please help us welcome ***Samuel (Max) Mondonedo*** to the team!

- ***Shredding Day 2023 is right around the corner! Wednesday, August 23rd from 9:00am-11:00am*** we will be posted up in the parking area behind the Augusta office. Donuts and coffee will be provided!

- 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 searching The Mendall Financial Group.***

Our best,

Peter Kim

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2023 Forbes Best-in-State Wealth Management Teams list.

The 2023 Forbes ranking of America's Top Wealth Management Teams Best-In-State, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone and in-person due diligence interviews, and quantitative data. This ranking 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.