



Changes at *The Advisory Group!*



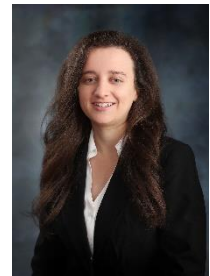
Brent J. Beverly, CFP® - Christian F. Li, CFP® - Manuel F. Chinchay, CFP®

The Advisory Group celebrated our 35th year in business last year. Unfortunately, we were not able to share our celebration due to the protective measures needed to combat COVID-19. We have certainly come a long way from last year, and even more so since Brent and Chris started the firm decades ago and built a TAG family of advisors, staff and clients. Our TAG Family continues to grow and change. There are new people joining our TAG Team and others are moving on to the next chapter of their lives.

Two long time members of our TAG Team are entering retirement this year, Steve and Pene Birckett. They have been with us for so many years. We will miss their presence as they move on to spend more time with their family, especially the grandchildren. We all wish them a fond farewell. Steve will be retiring on May 7 and Pene a month or so later. Please feel welcome to share your personal thanks for all their years of dedicated service.

We have two wonderful people joining our TAG Team:

We would like you to welcome **Kristina Halverson** as our newest Investment Services Assistant, joining William Glenn and Karla Drouet on our Advisory Services Team. Kristina is going to be one of your contacts for changes in your accounts such as changing beneficiaries, titling, or opening new accounts. Kristina is a lifelong Californian. She comes to *The Advisory Group* after graduating from UC Davis with a degree in Economics and Philosophy (ask her about her favorite thought experiment!). She enjoys spending time out of the office with her family and friends. She loves the Green Bay Packers and looks forward to her daily walks with her dog, Rusty.



Please also welcome **Katie Barrett** as our new Office Services Coordinator. She will be working with Pene for about a month (prior to Pene's retirement) to get up to speed on this important role. Katie brings an extensive background in customer service and is highly skilled in interpersonal communication and organization. She comes from a family of ASU Sun Devils and has a Bachelor's Degree in Liberal Studies from Arizona State University. Katie is also a self-acclaimed "soccer mom" and during her free time, she enjoys going to the beach and exploring nature with her young son. >

In these trying times, we are here to help you. As you can see we continue work on improving our support to you. We are fortunate to have Kristina and Katherine join Brent, Chris, Manny, Erika, Vivian, Karla, William, and Melinda as part of the TAG family. To see photographs and additional details on each of our TAG Team members, be sure to check out Our Associates page on our TAG website. While we may be operating from remote locations, we are all active to provide the support you need.

We hope you and yours are all staying healthy and safe. We know these are challenging times, and we believe there is still a LOT more to come. Please do not hesitate to pick up the phone and give us a call if we can be of service. We are here for you.

Brent, Chris, and our entire TAG Team

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