



# Changes at The Advisory Group!



Brent J. Beverly, CFP® and Christian F. Li, CFP®

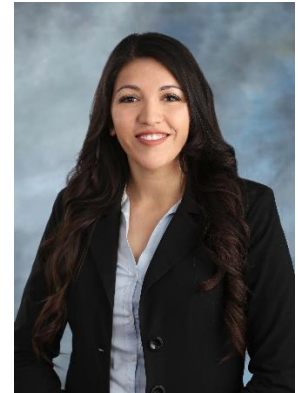
TAG – Always Making Progress

The Advisory Group is celebrating our 35<sup>th</sup> birthday this year. We have come a long way since Brent and Chris started the firm and built a TAG family of advisors, staff and clients. And as with all families, there are additions and time for others to move on to the next chapter of their life.

Our Business Manager, Kim Westerman-Broer, has been with the TAG team for many years. Kim retired on April 5, 2020, exactly 16 years to the day after first coming to work with The Advisory Group. She has told us this is a bittersweet moment in her life, but we know with a new grandchild who just arrived, it will be much more sweet than bitter. Kim is sure to be around from time to time. Now she will be attending our client events as a guest and not working behind the scenes to put the events together.

We mentioned new additions at the beginning of our letter and want to introduce you to two new people joining the TAG Team:

Please welcome Erika Gutierrez as our new Office Manager. She had a nice turnover, working with Kim for over a month, to get up to full speed in this challenging position. Erika brings great business experience with her and will be working closely with the TAG team to ensure we continue to provide the highest quality client service to all of you. Erika and her husband are parents to three very active girls. She enjoys being the Team Mom to two of her daughters’ softball teams. She also enjoys spending time at their cabin in Sequoia exploring nature and loves hiking.



We also would like you to welcome Will Glenn as our newest Investment Services Assistant. Will is going to be one of your contacts for changes in your accounts such as new beneficiaries, titling or opening new accounts. He is a lifelong Orange County resident and a Servite High School graduate. Go Friars! Will comes to The Advisory Group after graduating from Cal State Fullerton with a Business Administration degree in Finance. Will enjoys his time out of the office with his family, friends and especially his German Shepherd, Dany. He is also a huge 49ers fan, connoisseur of movies and TV and looks forward to his weekly game nights.

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 Erika and Will join Brent, Chris, Steve, Manny, Vivian, Pene, Karla 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 other locations, we are all active to provide support for you.

Stay healthy and safe. Please do not hesitate to pick up the phone and give us a call if we can be of service.

Brent, Chris, and our entire TAG Team

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*The Advisory Group, A Registered Investment Advisor*

***Your Goals; Our Guidance***

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