



OUR YEAR IN REVIEW 2024



TO OUR WONDERFUL **Clients & Friends...**

PROFESSIONAL HIGHLIGHTS

As we reflect on an incredible year, we are filled with gratitude for the trust, collaboration, and milestones we've shared together. 2024 has been a year of growth, celebration, and community for the entire HHFG team. From expanding our team with talented new members to achieving significant professional milestones, hosting inspiring events, and celebrating 30 years of turning visions into freedom, we've made it a year to remember.

This newsletter is our way of sharing the highlights and successes of the past year with you, our valued clients and friends. We're proud of what we've accomplished together and excited to continue building on this momentum in 2025. Thank you for allowing us to be part of your journey through life. Here's to another year of achieving goals, creating memories, and shaping bright futures together!

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WARM REGARDS,
The HHFG Team

PROFESSIONAL HIGHLIGHTS

LICENSING AND DESIGNATIONS ACHIEVED:

- **Jen Anderson** earned her Life, Accident & Health, Securities Industry Essentials (SIE), and Series 7 licenses. She also achieved her Licensed Service Assistant (LSA) and Registered Service Assistant (RSA) designations.
- **Chelsea** passed her Securities Industry Essential (SIE) exam and achieved her Licensed Service Assistant (LSA) designation.
- **Zach** passed his Life, Accident & Health exam.
- **Kyle Hoobler** passed his Life, Accident & Health exam.



WORK ANNIVERSARIES:

- **Kristin & Andrea** celebrated 1 year with HHFG.
- **Chelsea & Kyle Hoobler** marked 2 years.
- **Samantha I.** reached 4 years.
- **Samantha H.** celebrated an incredible 9 years.

MILESTONES AND EVENTS:

- **Matt Wuenschel** joins the team as a Wealth Strategy Coordinator
- The creation of **The Freedom Compass** – A powerful tool designed to help clients navigate their financial journeys with clarity, purpose, and alignment.
- The team traveled for professional development, including Luke and Colton attending the Eagle Elite Advisor Symposium.
- We attended Corning Community College's Women's Empowerment Conference.
- Hosted the **first annual Charity Casino Night** for Toys for Tots
- Celebrated **HHFG's 30th Anniversary** with a surprise hot dog cart lunch—Kyle Herrington was truly caught off guard!
- Jen Anderson joins the team as an Associate
- The team traveled for professional development, including: The Mountain to Success Mastermind, The Velocity of Money, Elite Advisor Symposium and Becoming the Master Communicator
- HHFG hosted Living Life by Design—a dynamic workshop that gave participants renewed clarity and fresh confidence to shape the lives they truly want



PERSONAL HIGHLIGHTS

INDIVIDUAL TEAM MEMBER MOMENTS:

- Andrea celebrated her marriage to Josh.
- Mike (and Quincy!) moved into their forever home and welcomed their daughter, Henley.
- Matt celebrated his marriage to Katie.

GROUP ADVENTURES:

- Team Retreat Day at Bristol Mountain Aerial Adventures for growth and camaraderie.
- Partnered with Pugh Self Protection to host a half-day course with our team
- Chelsea won our office Step Challenge by walking an impressive 198 miles over four weeks!
- Observation of the Solar Eclipse
- First ever Thanksgiving luncheon as a team
- Act & Do Golf Tournament





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PREVIEW OF 2025

MULTI-DAY CLIENT EVENTS

TEAM GROWTH

SUBSCRIPTION MODEL

EXPANDING VIRTUAL NETWORK

5 ACTION STEPS for 2025

- ☐ **Maximize Contributions** – Reach annual limits for IRAs, 401(k)s, and other retirement accounts.
- ☐ **Implement Tax Strategies** – Finalize Roth conversions, charitable giving, and tax-loss harvesting.
- ☐ **Consolidate Financial Data** – Organize income, expenses, and investment performance documents.
- ☐ **Review Cash Flow** – Assess income, expenses, and liabilities to identify savings opportunities.
- ☐ **Engage Beneficiaries** – Introduce children or beneficiaries to your advisor for future planning clarity.



Bring On 2025!



Turning Visions into Freedom

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