

# Firm Honored for Excellence in Wealth Management at 2017 1st Global's National Conference

Moorman, Harting Financial Services, Ltd., headquartered in Coldwater and Celina, was recognized for its extraordinary achievements throughout the year at the 2017 1st Global National Conference that took place from Nov. 12–14 at the Omni Fort Worth Hotel.

“Diamond Eagle firms set themselves apart from the crowd because of their commitment to excellence, demonstrating what it takes to excel in remarkable fashion,” 1st Global Chairman and CEO Tony Batman said. “They are dedicated to the individuals, families and businesses they serve, and they create a precedent for others to follow through their passion and admirable conduct.”

The Diamond Eagle award is given to firms based on the criterion of the firm's production volume across all product lines and is given to those firms that have consistently demonstrated 1st Global's purpose — to enable intentional living — and have cultivated their practices in ways that help their clients seek to live intentionally in their own lives as well.

1st Global is pleased to congratulate Moorman, Harting Financial Services, Ltd. for reaching 4 Diamond Eagle status. We deeply appreciate Moorman, Harting Financial Services, Ltd.'s devotion to serving its clients through comprehensive financial planning advice, and we commend Moorman, Harting Financial Services, Ltd. on its continued progress and accomplishments.

This year marks the 25th anniversary of 1st Global — a monumental accomplishment for any business — and the conference theme, “Celebrating Significance,” highlighted the significant milestones earned by decades of hard work and the significant relationships, friendships and partnerships created in the process.

1st Global enlisted the wisdom of a handful of key speakers to share their experiences and insights on significant trends that drive markets and the significant opportunities created by them. Speakers included Chip Heath, best-selling author and professor at Stanford Graduate School of Business; Ann Compton, legendary ABC News White House correspondent; Megan Greene, chief economist at John Hancock Financial Services and Manulife Asset Management; Michelle Singletary, national syndicated personal finance columnist; Jeremy Gutsche, chief executive officer of Trendhunter; and Harley Gordon, president of CLTC.

Additionally, 1st Global President David Knoch provided a look forward into the next 25 years to provide advisors with perspective on how 1st Global will continue to help its affiliated firms thrive and take advantage of the significant opportunities ahead.

## **About 1st Global**

1st Global was founded in 1992 by CPAs who believe that accounting, tax and estate planning firms are uniquely qualified to provide comprehensive wealth management services to their clients. 1st Global is a research and consulting partner that provides CPA, tax and estate planning firms with the education, technology, business-building framework and client solutions that make these firms leaders in their professions through dedicated professional client relationships built around wealth management. Around 400 firms have chosen to affiliate with 1st Global, making it one of the largest financial services partners for the tax, accounting and legal professions.

Securities are offered through 1st Global Capital Corp., which is a Member of FINRA and SIPC and is headquartered at 12750 Merit Dr., Ste. 1200 in Dallas, Texas, 214-294-5000. Investment advisory services are offered through 1st Global Advisors, Inc. Additional information about 1st Global is available at [www.1stGlobal.com](http://www.1stGlobal.com).



### **The Award Winning Firm**

**Financial Advisors**

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