

MOORMAN, HARTING FINANCIAL SERVICES, LTD.



Financial Advisors

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Firm News – August 2019

Amanda R. Brackman, CPA Promoted to Accounting Manager



Amanda R. Brackman, CPA

Moorman, Harting & Co., Certified Public Accountants & Financial Advisors with offices in Coldwater and Celina are pleased to announce that Amanda R. Brackman, CPA, has been promoted to the position of Accounting Manager. As Accounting Manager, Amanda will be responsible for providing internal continuing education for all Accountants of the firm on changes in generally accepted accounting principles. Generally accepted accounting principles (GAAP) refer to a common set of accepted accounting principles, standards, and procedures that companies and their accountants must follow when they compile their financial statements. GAAP is a combination of authoritative standards (set by policy boards) and the commonly accepted ways of recording and reporting accounting information. GAAP improves the clarity of the communication of financial information.

Amanda will also manage many of the review engagements that the firm preforms. In addition, Amanda will continue her services in tax planning and preparation for individuals and businesses.

Amanda earned her Bachelor's Degree in Accounting and Finance as well as a Master's Degree in Accounting from Wright State University. She is a member of the American Institute of Certified Public Accountants and Ohio Society of Certified Public Accountants. She participates in professional development seminars and classes to ensure high quality accounting and tax services for the firm's clients. Amanda resides in Ft. Recovery with her husband Dan.

Alan E. Wolters Attends Conference

Alan Wolters recently attended the Dimensional Foundations Conference in Chicago, Illinois on June 18th and 19th. The conference focuses on Dimensional's market philosophy and investment approach and explores multiple aspects of integrating Dimensional strategies into an advisory business, including building global portfolios, communicating investment principles, and highlighting the value of advice to clients. Advisors left with a strong understanding of how Dimensional can support their investment offering, marketing efforts and business strategy.



Alan E. Wolters
CPA / Financial Advisor

Financial Advisors Attend 1st Global's Eagles Executive Forum

At Moorman, Harting Financial Services Ltd. we continue to obtain the highest professional education possible in order to provide the most beneficial client experience and service possible. On May 19, 2019 through May 21, 2019 James Harting, Randy Kaup, Doug Bertke and Mary Jane Koesters attended 1st Global's Eagles Executive Forum. At this professional education event various subjects were discussed including a Supply-Side Conversation with Dr. Arthur B. Laffer. "Planning the Road Ahead" was presented by John Clendening CEO of Blucora, Inc. The "Advisory Firm of the Future" was presented by Philip Palaveev, CEO of The Ensemble Practice. Real Estate Market Trends was presented by H. Michael Schwartz, Founder, Chairman and CEO, SmartStop Asset Management, LLC and finally, "Forces Sharing the Advice Industry" was presented by Sanjiv Mirchandani, President, Fidelity Clearing and Custody Solutions and David Knoch, President of 1st Global. These presentations along with networking opportunity provided the participants with the education and guidance to be able to continue to serve their clients in the most efficient way.



James W. Harting



Randall L. Kaup



Douglas M. Bertke



Mary Jane Koesters

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Investment advisory services offered through 1st Global Advisors, Inc.
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