

# MOORMAN, HARTING FINANCIAL SERVICES, LTD.



Financial Advisors

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## Firm News – May 2018

At Moorman, Harting Financial Services Ltd., we continue to try to provide our Financial Advisors with targeted education from industry experts. As part of this process, on April 24<sup>th</sup> and 25<sup>th</sup> James Harting and Alan Wolters attended meetings providing production-based peer networking and education with a strategic focus at 1<sup>st</sup> Global headquarters in Dallas, Texas. This event was part of the wealth instruction and networking program that our firm participates in. This program is designed to be a premier business building and strategic education program for CPA wealth managers in the United States. The April meetings had specific sessions on long term care protection, commercial real estate investments, legacy planning concepts and IMS solutions. We believe that by gaining exclusive access to 1<sup>st</sup> Global and industry experts that it will help enable the firm to continue to provide quality wealth management services to our clients at a high level.

Mary Jane Koesters and James Harting also attended a similar meeting on January 23<sup>rd</sup> and 24<sup>th</sup> at 1<sup>st</sup> Global headquarters in Dallas. Their meeting focused on life insurance legacy planning, annuity titling, economic market perspectives and various other legacy planning concepts.



### **Our Team of Financial Advisors**

Alan E. Wolters – Randall L. Kaup – James W. Harting – Douglas M. Bertke  
Mandy M. Homan – Mary Jane Koesters – Daniel J. Koesters

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