

Moorman, Harting & Company
Moorman, Harting Financial Services, Ltd.
Certified Public Accountants - Financial Advisors

Firm News – January 2020

**Mary Jane Koesters & Mandy Homan attend
WIN Global meeting held in Dallas, TX**



Mary Jane Koesters
Financial Advisor



Mandy M Homan
Financial Advisor

Mary Jane Koesters & Mandy Homan attended the WIN Global meeting held in Dallas, TX on January 14-15, 2020. The one and a half day meeting, with a focus on driving firm growth, provided opportunities to network with production-level peers and Avantax Wealth ManagementSM professionals. Industry experts provided insight on Economic & Market review and an update on the state of the industry. They gained valuable education on Tax Smart Investing and new resources to move the firm forward.

It's a Girl!

We would like to congratulate Kelsey and Kalobb Dodson on the birth of their first child! Olivia Renee Dodson was born on December 21st 2019. She was 7lbs 2oz and 19.5 inches long.



Laurie Bruns Joins Professional Staff at our Celina Location



Moorman, Harting & Company proudly announces the addition of Laurie Bruns to our firm. Laurie will be the new Office Administrator for Moorman, Harting & Company's Celina office. She will be providing administrative support and processing E-files for individual and corporate returns. Laurie will also be providing accounting services for business clients.

Laurie is a graduate of Marion Local High School and has earned her Associates Degree for Administrative Assistants. She has over 30 years of experience working in an office environment. Laurie resides in Coldwater with her husband Tom and both have resided in Mercer County all of their lives. They have two wonderful children and seven active grandchildren.

Securities offered through Avantax Investment ServicesSM, Member FINRA, SIPC.

Investment advisory services offered through Avantax Advisory ServicesSM.