

# MOORMAN, HARTING FINANCIAL SERVICES, LTD.



Financial Advisors

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## Firm News – June 2018

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 21, 2018 through May 23, 2018 James Harting, Doug Bertke and Mary Jane Koesters attended 1st Global's Eagles Executive Forum. At this professional education event various subjects were discussed including "A Guide to Thriving in a Changing World" by Joseph Jordan, an Inspirational Speaker and Behavioral Finance Expert. Through real life examples he showed the need for life insurance and how it should be properly utilized. An Economic Market Outlook was also provided by Dr. Komal S. Sri-Kumar, President of Sri-Komar Global Strategies. A session was also presented on "How to Elevate the Client Experience" by Rob Richardson, CIMA, North American Spokesperson for Franklin Templeton. Technology and growth challenges were discussed through facilitated group discussions. David Knoch, President of 1st Global closed out the conference with an educational session on "Taking Advantage of Today's Marketplace." In addition to all these educational sessions, networking with other Financial Advisors was available and experienced.



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

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

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