MARCH 2022 / WWW.MFGTEAM.COM

MFG OBSERVER

MIDWEST FINANCIAL GROUP

Semi-Annual Update

CATCHING UP

I hope this finds you and your loved ones doing well as we roll into the new year! It's great to see on the calendar that the first day of Spring is coming on Sunday, March 20th – I always feel like Spring can be a great rebirth for us all. The days start to feel longer, the snow here in Wisconsin begins to melt, and in general, it's a celebration of the better days that come to us here in the Midwest!

MFG UPDATES

Change is the theme of the first of my semi-annual messages this year, and it's not just because the seasons are changing. It has a lot to do with some significant changes that are going on behind the scenes at Midwest Financial Group! Let me explain.

To begin with, I want to let you know that the amazing Lori Denoyer, who worked at the front desk in our Seminole Highway office for years, has moved on to the next chapter in her life. You know what an amazing member of the Midwest Financial Group family she was for anyone who spoke to her on the phone or met her in person! We already miss her, but we wish her nothing but the very best as she heads forward to new endeavors closer to home.

LORI DENOYER

THANK YOU LORI DENOYER
for your years of service. We wish you all the best on your new endeavors!

That leads us to the new members of our Midwest Financial Group family. We are thrilled to announce the additions of brand-new team members Sandra Mell and Jessica Mooberry! Sandra and Jessica will be stepping into front office roles moving forward, helping be the first line of contact that many of you have with our firm. I like to call them the 'Directors of First Impressions' as they will be the first line of contact many of you have when you call in to reach us or even walk through some of our office doors. We're excited to have them onboard and cannot wait for you to meet them.

We also welcome back Jordin Kneiss to the team! She may be a familiar face and name for those of you who have been a firm member for a few years now. Jordin worked with us from 2016 to

MATTHEW CUPLIN

Certified Financial Fiduciary®
Certified Financial Planner™
Professional Financial Planner
President
Chief Executive Officer

STRAIGHT FROM THE SOURCE

Click the link below to watch the video.

NEW SERVICES COMING IN 2022!

Tax Planning,
Accounting,
Bookkeeping,
and more...

KEEP AN EYE ON OUR WEBSITE,

www.mfgteam.com, for updates throughout the year. This is also the best place to view previous messaging.

2017 before moving closer to loved ones and continuing her education in Milwaukee. Our paths crossed again, and when the opportunity to bring her back onboard arose (thanks to her moving back near Madison and completing her education goals), we immediately found a way to make it work! We believe that you can never have enough good people, and she'll be assisting our advisors and team in many ways throughout her second tenure with the firm.


SANDRA MELL


JESSICA MOOBERRY


JORDIN KNEISS

Beyond that, we also welcome our 5th Financial Planner to the group, Nick Krey. I've known Nick for many years, and he's a very talented advisor with strengths in planning, insurance products, and helping people throughout the community plan for their financial future. Nick will be joining the firm, learning the "Midwest Financial Group Way," and helping serve our ever-growing client base for a very long time. Nick's addition allows us to have a well-rounded group of 5 very talented Financial Planning Advisors on staff. We cannot wait to introduce you to him!


NICK KREY

That's a lot of change, right? So the next question you may ask is, why are we doing it? That's where I'll begin to tie this all together and provide you just a little 'tease' of things to come in 2022…

LOOKING AHEAD

The fact is we are growing, and our client base is expanding. We do not want to turn away people who need our help and guidance, so we are proactively doing this to continue to support the firm's growth. At the very cornerstone of our value proposition are client service and integrity. We pride ourselves on giving each of you the best experience and planning that we can. And to do so, we have to grow our team in the process. It's an excellent situation for us to be in, and it's all thanks to you, our clients, who continue to trust us and let us be a part of your world. For that, let me sincerely say 'thank you' – and I mean that from the bottom of my heart.

Also, these new team members bring with them additional skills, expertise, and overall more support – something that is paramount to a growing business.

WHAT'S NEXT?

If you're wondering how these market trends might affect your specific financial plan—or how to take advantage of them—give us a call. We'll talk about where you're at, and how to get where you want to be.

Get In Touch!

That is not where the growth stops. In early summer, we will be announcing the addition of a new set of services we will be able to provide you, focused on tax planning, accounting, bookkeeping, and more. It will truly make us a one-stop-shop for many individual and business clients! At that point, we will have the overall financial planning you've come to appreciate and the insurance services many of you already use. Of course, we will still be able to work with business owners and their employees across the area. But we'll also have some brand new tax planning services to share with you all. We cannot be more excited about this, and you will all learn about this in the next few months!

Change can be scary (and sometimes challenging) but it's a sign of growth. One thing that will not change is our dedication to always putting our clients' best interests first. We will continue to focus on delivering world-class service, providing you access to a wide array of financial professionals and products, and doing all that with the backdrop of having a plan for you and your family. I invite you to reach out to me with any feedback, suggestions, or questions. We can always make sure we are doing our very best to serve you and your needs through interactions like that.

We're very hopeful that 2022 will be the best year ever for our blossoming firm and, more importantly – for you, our clients!

Be well until we see each other again!
Very Sincerely,
Matt Cuplin

STRAIGHT FROM THE SOURCE
Click the link below to watch the video.

CLICK HERE TO GET IN TOUCH!
