

## Fall 2015 NEWSLETTER

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## Are Those You Care About Protected?

### *Letter from the Founder - Erin Botsford, CFP®, CRPC*

Don't you wish birth certificates came with an expiration date? That would make planning really easy! You would know exactly how long your assets had to last you. You would know exactly when your beneficiaries would inherit your financial legacy. You could take the year before, month before or week before to have those really important conversations. Without this absolute knowledge of what the future holds, planning for the unknown can make all the difference in the world.



[Click here to read more](#)

## "NEXT" WEBINARS

As we prepare for the holiday season, we exchange skeletons and ghouls for Santas and elves. However, it's worth confronting the financial skeletons you still have hiding under your bed. With that in mind, our last webinar explored the intricate maze of seizing financial opportunity, risk management, recognizing common yet overlooked roadblocks where we often find ourselves and how to ensure you keep your lifestyle despite the financial climate.

We will be wrapping up this year's NEXT Webinar Series on Tuesday, November 3rd at 11:30am CT. Please join us for our discussion of a topic that is certainly pertinent to all those employed in today's ever-dynamic and changing workforce: Employee Benefits - Tools and Information to Help You Navigate Re-Enrollment with your Company for 2016. Sheri Pixley, Executive Vice President at Lockton Dunning Benefits and a valuable Botsford Financial Group resource on the topic, will provide tips and pointers for navigating what can sometimes be an overwhelming and daunting process, especially with so many optional benefit programs to consider. We hope you join our upcoming webinar on Nov 03, 2015 at 11:30 AM CST.

***Employee Benefits - Tools and Information to  
Help You Navigate Re-Enrollment with your Company for 2016***

[Click here](#) to register now!

## Success to Significance

### *The Pogues - Redirected, Not Retired*

Two themes always seem to pop up in Paul Pogue's life as a successful business owner and prolific contributor to activities that help other people. One, there is a faith element, and two, he tends to find endeavors that become way more complex than he originally thought. Such was the case when he and three friends decided they wanted to help victims and first responders of the Joplin, MO, tornado of May, 2011.



[Click here to read more](#)

Botsford Financial Group Founder's Message



[View Our Brochure](#)



### Meet Our Newest Team Members



#### Michelle Shields

Michelle is a Client Service Associate. Michelle implements new client investments, as well as service requests on existing investments.

## Open House - Join Us Next Week!



Botsford Financial Group invites you to an  
**OPEN HOUSE**

Come join us in celebrating our new office in Frisco!

Hall Office Park  
3001 Dallas Parkway  
Suite 100  
Frisco, TX 75034

**WEDNESDAY, OCTOBER 21, 2015**

**4:00 P.M. - 7:00 P.M.**

**Enjoy a live DJ, cocktails & hors d'oeuvres!**

Kindly reply below by October 19th or call 214.423.4200

[Click Here to  
RSVP](#)



There is no better way to grow our business than to have great clients, friends and family refer our business to those for whom they care. It is the best compliment we can receive! We would like to recognize the following clients, friends and associates who referred a friend to our firm in the past 3 months:

LL & Ka Cotter  
Steve & Sharon Bohannon  
Tommy & Renee Parrett  
Jim & Diane Beckett  
Peg Petersen  
Ed & Beth Bull  
Barry Henry & Lennie Sullivan  
Earl & Carrie Smith

Jerry & Maribess Miller  
Jeff & Dana Barber  
Joanne Eaton  
Roderick & Teri McClure  
John & Lori McDevitt  
Verne Ticknor  
Russ & Kelly Buettner



### Lauren Hanna

Lauren is our Director of First Impressions. She performs project management tasks and ensures the office's daily operations are running smoothly.



### Chad Lange

As a Relationship Manager based in the Atlanta office, Chad assists with the development of customized financial statements for clients throughout all phases of their planning process.

*Securities offered through LPL Financial, member FINRA/SIPC. Financial Planning offered through Lifestyle Planning Solutions, LLC, a registered investment advisor. Advisory services offered through Stratos Wealth Partners, a registered investment advisor. All companies listed are separate entities from LPL Financial.*

### Dallas Business Journal

Erin was featured in the Dallas Business Journal and hailed as one of the Top 100 Women-Owned Businesses in North Dallas.



### Erin Botsford

Erin was featured on the syndicated business program WealthTrack with Consuelo Mack this September. Erin extended her expertise in finance and answered questions regarding the market.



### Kay Lynn Mayhue

On September 10th, President Kay Lynn Mayhue was featured in The Wall Street Journal. [Click here](#) to read her words of insight!



## TEAM ANNOUNCEMENTS

### Botsford Financial Group

We just received word that InvestmentNews selected Botsford Financial Group as winner of the 2015 'Best Practices' Award! "Your growth and overall human capital strategies clearly position Botsford Financial Group as one of the leading firms in the industry."



### Five Star Award

Dallas advisors Blaine Malcolm, JP Pattinson and Kyle Shores as well as Atlanta advisors Kay Lynn Mayhue and Brad Cast were recognized as 2015 Five-Star Wealth Managers. This is a select group representing less than 4% of the wealth managers in DFW and 7% of the Atlanta market.



### Susan G Komen

At Botsford Financial, we have several charities close to our hearts. With a fraction of our staff harboring breast cancer testimonies - some of triumph, some of loss - it is our grand honor to participate in the Susan G. Komen 60-mile walk this November. Please help us by making a donation. Every dollar counts, and every life matters! [Click here to donate](#)

