

Winter 2016 NEWSLETTER

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"NEXT" Webinars

We hope you will join us for our upcoming "NEXT" webinar, "*Estate Planning Basics: Do I Need a Will?*" on March 22nd at 11:30 AM (CDT).

Allyson Bohannon, our JD on staff and local estate planning attorney, will walk you through basic estate planning issues to help you identify you and your family's needs.

[CLICK HERE](#) to register!

THE QUARTERLY

Letter from the Founder

Erin Botsford, CFP®, CRPC

Happy New Year! In preparing to write this first message of the New Year, I had to stop myself from falling into the trap of framing 2015 by what the financial markets did.....because they did nothing. If you didn't own ten specific stocks in the S&P 500, it is likely your portfolio value did not go up. Having been trained as a stockbroker, for the first seven years in this business I lived and died by the performance of the various financial markets, none of which I had any control over. The interesting part is neither you nor any other individual on the planet have any control over what the financial markets will do one year or the next. [Click here to read more](#)



Rising Interest Rates: What Does it Mean to You?

By Kay Lynn Mayhue, President of Botsford Financial Group



As Seen in
THE WALL STREET JOURNAL.

The buzz on "the street" is all about when the Federal Reserve will raise interest rates. The debates are around the timing, how high it will go and how quickly it will happen. In other words, the debate is around the how and when and not the "if." Have you done a quick check to see how rising interest rates could affect you and your financial world?

[Click here to read more](#)

Success to Significance

***Golf for Fun Turns into Autism
Fund Raiser - The Samuels'***

Ron Samuels compares his retirement to a Pony Express rider who might change mounts, but never stops moving. His colleagues predicted when he retired that he couldn't stay away from the company where he had worked most of his life. "He'll be back in a day or two, they said," Samuels remembers. "But when I walked out, I walked out and didn't go back until the Christmas party."

[Click here to read more](#)





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Botsford Financial
Group Founder's
Message



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thank you

for your referral

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 2015:

Mike & Christina Cadem
Steve & Lezlee Simpson
Kristi Francis
Tommy & Renee Parrett
Roderick & Teri McClure
Carol Nichols
Al & Kathy Rapp
Jim Mittan
Randy and Sandy Stashick
Barry Henry & Lennie Sullivan
Altan & Kathleen Stalker
Jeff & Dana Barber
Joseph & Judy Zito
Jim & Diane Beckett
Manny & Barbara Reyes
Paula Mann
Trea Yipp
Kathryne Pusch
Joanne Eaton
David & Margaret Altimont
Dana Hyatt
Anna Miller
Alan & LaRee Stein
Carol Polasky
Steve & Sharon Bohannon
Tony & Charlene Palmisano
Harold Finkel & Linda Bryant
Nick & Beth Garvey
Steve Buholz
Nina Jones
Russ & Kelly Buettner
Andrew & Amy Barker
Ron & Jo Foster

Charles Martin & Whitney Johns Martin

Ron & Jan Samuels
Mike & Marilyn Strand
Lisa O'Bryant
John & Lori McDevitt
Fred Fernandez & Irma Rodriguez
Jerry & Maribess Miller
Vince DiGangi & Christine Owens
Cheryl Hall
Wayne Nelson
Dave & Sheila Beuerlein
Ron & Judy Skipper
John & Terry Quinn
Peg Petersen
Earl & Carrie Smith
Hank & Sandy Moles
Chris & Diane Paddison
Fred Sumner
Al Clegg
Alan & Jackie Gershenhorn
Verne Ticknor
Jim & Mary Conley
Troy & Janet Zipperer
David & Andrea Chionsini
Steve & Tammy Nellis
Jennifer Buchanan
Gary & Jean Farris
Frank & Diana Finn
Jim Farrell
Bruce & Jeraldine Jones
LL & Ka Cotter
Monica Davis
Tara Winslow
Ed & Beth Bull

Team Announcements!

Welcome Our Newest Team Member

Nate Cavender - Vice President, Client Relations

We are excited to introduce our newest team member, Nate Cavender! Nate's primary role as an advisor at Botsford Financial Group is the development of new client relationships and the constant improvement of existing relationships.



Prior to Botsford Financial Group, Nate earned his bachelor's degree in finance from Texas Tech University. Nate served eight years in the United States Air Force as an officer/pilot. He was an Instructor Pilot in the C-17A and amassed over 650 hours of combat flying time. He was awarded the Meritorious Service Medal, 3 Air Medals, and 2 Air Force Commendation Medals before separating in the rank of Captain. During his service, Nate graduated from American Military University with an MBA in Global Business in 2012.

His passion to serve, along with his love of finance, guided him in pursuing a career in Wealth Management. Just as he never flew any mission without a detailed plan, Nate understands the importance of detailed thorough planning when it comes to achieving your financial goals. When Nate is not working with clients, he dedicates his time to his family, friends, and passions. He lives in Dallas with his wife Crystal. Nate enjoys flying, playing golf, working out, and is an active member of the Dallas Sigma Chi Alumni Chapter. Nate and Crystal attend the Village Church.

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Advisory services offered through
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