Summer Checklist

Letter from the President
Kay Lynn Mayhue, CFP®, AEP®, RFC®
Summer can be a time of rest and relaxation with family and friends. I hope you are also taking some time to focus on getting your financial house in order. Here is our top ten to-do list for the summer of 2016 to help with that task. We are here to serve you so please let us know if there is anything in your financial house that we can assist you with this summer season.  Click here to read more

And Then Lightning Struck....

Erin T. Botsford, CFP®, CRPC
Founder/CEO
Recently, I was told of two incidences where lightning struck. In the first, a neighbor of a very good friend of mine had their house burn to the ground after being struck by lightning. Even sadder was the fact the people were out of town attending a parent's funeral. They came home to ashes but had the mindset that at least no one was hurt in the fire. In addition, my own son had his cell phone ripped out of his hand while standing in his house and saw a burst of an electric shock from a wall socket. They lost their security system and some connectivity to their TV's but otherwise had no significant damage. But one never knows.... Click here to read more

Ask the JD

Allyson Bohannon, JD
Relationship Manager/Estate Planning Coordinator
Q: What are an executor's responsibilities, and who should I pick to serve in that role?

Click image above to view video

Have a question you’d like answered?
Email abohannon@botsfordfinancial.com
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:

- Tommy & Renee Parrett
- Alex Knight
- Nick & Beth Garvey
- Tony & Charlene Palmisano
- Martti & Cookie Benson
- Ed & Beth Bull
- Kathleen Hall
- Brandon & Shatory Carr
- Cynthia Montgomery
- Phil Marcell
- Steve Sanders
- Gary & Jean Farris
- Lori Galligan
- Connie Crowley
- Christy Holder
- Jeff & Rose Gault
- Barry Henry & Lennie Sullivan
- LL & Ka Cotter
- Kelly Bohrer
- Andrew & Lauren Fisher
- Hank & Sandy Moles
- Cheryl Hughes

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**How To Avoid Overspending By Planning Your Vacation**

While vacations conjure images of fun, frolic, adventure and a carefree spirit, a down-to-earth plan for these interludes - particularly how to pay for them - is an important part of your financial plan. Nothing says "bummer" like returning home from that wonderful trip and not being able to pay for it right away...

[Click here to read more](#)

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**Team Announcements!**

Erin Botsford named One of the Top 100 Women Advisors On Barron’s List of Top Advisors

Once again, we are pleased to announce Barron's magazine has recognized Erin Botsford as one of its Top 100 Women Financial Advisors for 2016.

Financial Advisor Botsford Marches to a Different Drummer

Erin Botsford, CEO of Botsford Financial Group, was recently interviewed by Barron's magazine to discuss how she developed her own investment philosophy. [Click here to read the full interview](#)
Atlanta advisors Kay Lynn Mayhue and Brad Cast were recently recognized as 2016 Five-Star Wealth Managers. This is a select group representing a small amount of wealth managers in the Atlanta Area.

The 5 Star Award is based on 10 objective criteria associated with providing quality services to clients such as credentials, experience, and assets under management among other factors. Wealth managers do not pay a fee to be considered or placed on the final list of 2016 Five Star Wealth Managers.

Welcome Our Newest Team Members!

**Joey Beason - Relationship Manager**

As a Relationship Manager, Joey analyzes and processes documentation in order to assist in the development of client financial and investment plans. Before joining Botsford Financial Group, Joey attended Texas Tech University where he obtained his Bachelor's degree in Personal Financial Planning. Joey also gained experience by completing an internship at Merrill Lynch Wealth Management in Lubbock, TX. After Graduation, Joey relocated to McKinney, TX where he now likes to spend his free time working out and keeping up with his love for sports. He is also dedicated to obtain his Series 7 - General Securities Representative registration, Series 66 - Uniform Investment Advisor and his Insurance license.

**Jenn Leigh - Public Relations Coordinator**

Jenn comes to the Botsford Financial Team with a marketing and PR background. She is focused on brand management, social media and communication strategy. Creating media opportunities, facilitating client outreach, planning seminars and events and working as a project manager on marketing and PR ideas are some of her key responsibilities. Jenn comes to Botsford Financial Group with a Bachelor's degree in Business Marketing from Georgia Southern University. When she's not in the office, she is spending time with her family, finding new running trails or exploring Atlanta with her friends.