

YEAR IN REVIEW

2022



This year's annual FOCUS conference was held in Denver, CO at the Colorado Convention Center. With over 4,000 Financial Professionals in attendance and 250 breakout sessions this was an event to remember! Christine Sperry, CFP(R) from our office was in attendance and was excited to share all she learned. This is just another way SB Financial Services stays abreast of new technology, products, programs and more, allowing us to provide the BEST possible service to our clients. #lplfocus #alwayslearning #educationiskey #colorado2022



96.2%

Client Retention in 2022

\$252,925,227.22

in client assets serviced through LPL Financial

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Each year members of our Team volunteer and attend various events and charities in our communities. The local HS Homecoming tailgate, BBBS Gala, and the Middleton Chamber of Commerce Annual Bogey Boogie Golf Outing just to name a few.
#communityinvolvement #supportlocal #getinvolved



BIG ANNOUNCEMENT FOR 2023 NEW YEAR/ NEW NAME

SB FINANCIAL SERVICES



**Lake Ridge
FINANCIAL™**

SB Financial Services is merging with Monona Investment Center in early 2023 and will soon be operating as Lake Ridge Financial. New name, same great service PLUS more locations and a bigger team to serve you.



Rachel Kleven, FPQP(R) recently had the pleasure to present to the interns at State Bank of Cross Plains. She spent her time speaking to the talented group of young people on the importance of finding your passion and trying different things until you find the one that inspires you most. Rachel believes that people will always perform better if they are doing something they enjoy and that by doing so the monetary success will come naturally.



Attended 2 Advisory Council Meeting • Presented at 3 Seminars • 18 Motivational Monday Posts • Completed 27 hours of Continuing Education • 14 Locations of Convenience • 14,001 Economic Update Emails Sent • 5 Licensed Insurance Agents • 24 Chamber Board Meetings • 69 Volunteer Hours • 427 Facebook Followers • 3 Attendees at the Economic Forecast presented by Elliot Eisenberg • 463 LinkedIn Followers • 47 Financial Tip Friday posts on social media • 3 Certified Financial Planner™ Professionals • 8 Networking Events Attended • \$1000.00 donated to the Dane County Humane Society • FOUR consecutive quarters at the #1 spot among all Bankers' Bank investment programs for 2022.



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