2023 YEAR IN REVIEW

Lake Ridge FINANCIAL™

2023 STARTED OUT WITH A BANG!

SB Financial Services and Monona Investment Services completed their merger of equals in February and a new and improved team emerged... **LAKE RIDGE FINANCIAL!**

Our team of twelve dedicated professionals have come together to grow, learn, and engage with our clients and the communities we serve. This includes MORE locations, MORE associates, and MORE opportunities to serve YOU!

99.3% CLIENT RETENTION IN 2023

$435,514,360 IN CLIENT ASSETS SERVICED THROUGH LPL FINANCIAL

THIS YEAR WE HAD TWO NEW ADDITIONS TO THE TEAM.

In April 2023, **Francis Friend** joined us as an Associate Advisor. He has been in the industry since 2008 emphasizing insurance; he serves our Cottage Grove, Sauk, and Belleville communities.

A few months later **Brin Lehner** joined us as a Client Service Coordinator out of our Evansville location. Brin came to us with experience in estate planning, trusts, and business law. Both she and Francis have been a terrific addition, and we are glad to have them!

26 Seminars attended • 164 Volunteer hours • 237 Hours of Continuing Education • 17 Networking Events • 57 Chamber/Rotary/Advisory Council meetings attended • 7 Conferences attended • 46 Team meetings attended • 458 Facebook Followers • 586 LinkedIn Followers • 16 Motivational Monday posts • 3 CFP®'s on staff

Each quarter, LRF holds a 4-hour Team Meeting. This allows us to review compliance updates, learn about innovative technology available and business development. We arrange for guest speakers to come in and educate us on new products available in the market for our clients. #alwayslearning #cuttingedgetechnology

Rachel Kleven, FPQP® from our office was honored to be chosen as a BFSN Advisory Council Board member in 2023. This council was created to be the "voice of the field" and an opportunity to draw on different views and length of experience in the industry. It provides a way for BFSN, and their wealth management partners, to work together to provide the best in technology, advice and most of all, the client experience. They met several times online and in-person throughout the year.

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Each year our team chooses a charity to donate to in honor of our clients. This is something we began doing 8 years ago in lieu of Christmas cards. DAIS (Domestic Abuse Intervention Services) was our recipient for 2023. To learn more and see how you can help, check out their website: **abuseintervention.org**

With a new name comes new branding and this year has been full of that. Check out our new signage next time you visit.

Whether it is a Chamber event, walking in a parade, working at a dairy breakfast, ringing bells for United Way, or helping at bingo for the Madison South Rotary, our associates always enjoy volunteering and supporting our local communities.

#getinvolved

Several of our staff attended the Mini-Conference presented by BFSN. The conference ended with a blindfolded charity bike build for FB4K, an organization that builds bikes for underprivileged youth. To learn more about this wonderful organization check out their website: **fb4kmadison.org**

Jeff Supple, CFP® and Program Manager had the opportunity to speak to a room full of interns earlier this year. He shared his extensive knowledge of the financial services industry and encouraged these young leaders to plan for their financial futures at an early age.

LAKE RIDGE FINANCIAL RANKED #1

among all Bankers' Bank Investment Programs all three quarters of 2023! **Congratulations Everyone!**

LPL evaluated candidates by Rep Productivity: Assets Under Management (AUM) Growth: New Net Assets: Advisory Growth: Headcount Growth; Total AUM Growth: Total GDC. The top 40 in each category were given points, and the scores for each category were combined to give the investment programs a cumulative score. The data is reviewed, and the strongest candidates are considered and confirmed by LPL Financial.