

## "GROWING SOUTH"

In order to improve on service while at the same time grow our Financial Planning Practice I have decided to implement some positive changes to better serve you. Going forward Duthoit Financial has decided to join several trusted advisors / friends in a move to 221-1120 Gant Ave. – Grant Park Mall:

Combining the experience and skills of these advisors will only enhance the service provided to everyone involved. Each practice will operate individually however the collective knowledge support will be there to draw upon. This however does not change our relationship with Great West Life / Quadrus or any other Financial Institutions – "SO THERE IS NO CHANGE FOR YOU"

### **Have you met Scott Sherrett?**

Through the course of moving I have now had the good fortune of retaining a new associate by the name of Scott Sherrett. Scott has been with Great West Life in B.C. for the last six years as an employee benefits specialist. He moved to Manitoba to join us and to work with his dad's company "Sherrett Insurance". I look forward to working with Scott on a greater basis going forward and would like you to have the opportunity to meet him sometime soon.

### **Have you met Kathy Karasiuk?**

Another big change to our organization is the introduction of Kathy Karasiuk as our Administrative Assistant / Office Manager. Unfortunately Lise Jestadt was unable to join us at 221-1120 Grant Ave. (Grant Park Mall) and therefore Kathy will now cover off all of her previous duties. Lise will be greatly missed but fortunately for us, she was able to help Kathy out with a general introduction to our clients and business before she left. Kathy comes to us from Assante Financial Management with seven years experience in the business. While most of her experience lies on the Mutual Funds side I have no doubt she will be an added value to the company going forward. Please feel free to give her a call at 415-4208 with any questions you may have and while she may not have an immediate answer for you one will be forthcoming.

### **Thank you Lise**

One growing pain however, is that Lise has elected to take another position at Great West Life. Lise was instrumental in introducing me to Kathy and allowing the transition to progress as smoothly as it has. Lise has been a major reason our practice has thrived during some tough times and we all thank her for the contributions she has made.

### **Thanks to you!**

**Most importantly** I want to thank you for your patience during this transition with both the business changes and our move to another location. With any move there are bound to be a few hiccups and we unfortunately are not any different. You may have noticed that we have been experiencing some unforeseen technical problems and are doing our best to get them solved in a timely matter. So once again I appreciate all of your support and look forward to the very successful future of Duthoit Financial and friends.