
THE LOCKSHIELD LETTER

VOLUME 1: 2ND QUARTER



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LOCKSHIELD PARTNERS' 2ND QUARTER UPDATE



Here at Lockshield Partners, we consider our team to be a family. We are happy you are here and hope you enjoy seeing what our team is involved in outside of work. We believe the best way to make a difference in the world is to be involved with family, friends, and our communities.

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WELCOME TO OUR FIRST QUARTERLY NEWSLETTER

THE LOCKSHIELD LETTER

The most rewarding and enjoyable part of our service is building lifelong friendships and relationships with our clients and team members. Together, we plan for the good and hard times that life so often throws at us.

As we discussed ways that we can better serve our clients, it dawned on us that we can do a better job of providing updates regarding our business, our ministry efforts, and also personal updates from our team members. With this goal in mind, "The Lockshield Letter" was born!



BUSINESS UPDATES

MARKET UPDATE As many of you know, the S&P 500 is firmly in bear market territory. The technical definition of a bear market is a 20% decrease from an all-time high. Each week, our financial planning team will post an updated video on Facebook providing educational updates regarding the market. Our team will continue to focus on the Biblical principles of investing, which include focusing on the long-term, maintaining the proper allocation, and not acting based on emotion.



CHRISTIAN FAMILY RADIO

We're thrilled to announce the expansion of our long-standing partnership with Christian Family Radio. Each week, a member of our team will host a segment with Christian Family Radio. We'll discuss the Biblical principles of finance and how they impact us each and every day. Our goal is to continue educating the community on what God's Word says about money. We firmly believe that stronger balance sheets = stronger families = stronger communities.

KINGDOM ADVISORS Clark recently completed the training and exam to receive the Certified Kingdom Advisor (CKA®) designation. Kingdom Advisors is a community of financial advisors, accountants, and attorneys around the nation that strive to give Biblically-based advice. Dan and Clark now each hold their CFP® and CKA® designations. Earlier this year, Dan, Jeremiah, Clark, and their spouses attended the annual Kingdom Advisors conference to receive technical training and ideas for how to better serve clients.

COMPANY RETREAT



The Lockshield team traveled to beautiful French Lick, Indiana in April for our first company retreat! It was wonderful team-building time away from the office. We were able to utilize our retreat to reflect on the past year and plan for the future. We discussed how we could best serve our clients and our fellow employees in the coming years.



Our financial planning team - Dan, Clark, Jodi, and Jeremiah.



Jodi's daughter Emma relaxing in the West Baden Atrium.



Clark and Jamie enjoying some time on the grounds.



THE LOCKSHIELD MINISTRY



Dan gives one of the young men their suit coat-the highest level in the Boys to Men Program.

BOYS TO MEN ANNUAL BREAKFAST WITH DADS

We were overjoyed to have the opportunity to be a Community Tie Sponsor for Boys to Men, a local nonprofit reaching young men where they are and grow them into productive young men of society. This event helped make connections between men in our community and future leaders to encourage mentorship.

LIFE'S BETTER TOGETHER LUCK CASINO NIGHT

Life's Better Together is an organization consisting of families, friends, and parents working together to reach and support families with a critical or chronic illness. Life's Better Together provides direct financial assistance and support. We were honored to sponsor the event and have so much fun for a great cause in our community.



Jodi and friends enjoying Luck Casino Night.



Clark and Jeremiah representing Lockshield at the Golf Scramble.

HOLY SPIRIT CATHOLIC CHURCH GOLF SCRAMBLE

We are grateful for the opportunity to support the organizations that we're involved in. The Klein and Hayden families are parishioners at Holy Spirit, which is one of the largest faith communities in our region. Jeremiah's team won the day!

THE LOCKSHIELD MINISTRY



FOUNDATION CHRISTIAN ACADEMY ANNUAL GOLF CLASSIC

We had the opportunity to sponsor a hole in the annual Foundation Christian Academy Golf Classic in April. There was a great turn out of over 100 players and a beautiful weekend for golfing. We love supporting organizations in our community that are determined to make our area a better place!

THE HIVE CRAFT FAIR

Clark is a board member at The HIVE. The HIVE is an organization in Bowling Green that supports adults with special needs. The HIVE provides educational resources, classes, and community supports to help their members live their best life. The HIVE recently hosted a craft fair to continue raising funds for the purchase of their building.



The Hayden family with Laura Orsland, the director of The HIVE.



Dan and his team of hikers.

MY 3:59 RIM TO RIM

Dan's My 3:59 organization helps inspire others to accomplish what they once thought was impossible. Dan led two "Rim-to-Rim" hikes in the Grand Canyon in May. This hike involves hiking down one side of the canyon and back up the other side. In total, the hike takes over 12 hours and consists of 23 miles!



THE LOCKSHIELD FAMILY



We are so proud of Trish's daughter, Shawna, for accepting her offer to join Auburn University's school of Veterinary Medicine!



Trish and Tina attended the Metcalfe County Chamber of Commerce Breakfast in April.



Tina's daughter, Madison, graduated in May from WKU with an Agriculture degree and a minor in Biology. Congratulations, Madison!



The Klein family spending time together at the Grand Canyon.



Jodi and her daughter, Emma, enjoying the beautiful country, Belize.



Congratulations to Drew and Becky on their engagement!



The Haydens exploring the Castillo de San Marcos National Monument in St. Augustine, Florida.



Jodi getting up close with a Honduras Capuchin.



John Klein and the Maryville Saints Hockey Team won the conference tournament!

THE LOCKSHIELD FAMILY



Coach Clark Hayden led his D1 Reds to an undefeated season (D1 doesn't keep score).



Luke and Grant Harston, supporting their sister Jenna at her dance recital.



John Klein brought his college friends home to Bowling Green for a Maryville-Palooza. Of course a hockey game was necessary.



Tina and her family enjoying a cruise.





LOCKSHIELD —PARTNERS—

TOGETHER, WE PLAN.

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