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# Financial Focus

## HOLIDAY NEWSLETTER



### HIGHLIGHTS



December 2022

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As we end another year, I want to say, "Thank You" for your patience as we transition to LPL Financial. The vast majority of the process was completed on the move date in May. However, we'll need to continue to address the little surprises that manifest themselves in this first 12 months of making this type of move. As you see any glitches, please reach out to us. Happy Holidays!

### Change Happened

Last May, we transitioned our accounts from CUNA Brokerage Services, Inc (CBSI) as our broker dealer to **LPL Financial**. We also changed our program name from Financial Services Center to **UnitedOne Retirement & Investment Services (UORIS)**. Individual products and account holdings did not change, it was more about where our staff now goes to access information. Although you may recognize the UnitedOne Retirement & Investment Services name and mailings by now, also be on the lookout for things from LPL. *Their logo is to the right.* If you have questions on any mailings or need further explanation, please reach out to us at 920-652-2570.



*Jason R Muench*

Jason R. Muench, CRPC®, CFP®  
LPL Financial Advisor





### Ready to Review?

2022 hasn't been the best year for the markets – stocks or bonds. However, it has been a good year for appealing interest rates on fixed annuities. Whether we want safety or growth potential or both, it's good to review our overall product mix to see that it's still meeting our needs. I'd encourage you to give us a call at 920-652-2570 to set a review appointment if we haven't looked at things in the last 12 months.



### UORIS Staff



**Heidi** has been with us for 12 months already. She continues to fit in well and become more familiar with our clients and our processes week-by-week. **Rob** has been with UORIS since October of 2018 – four years already! He is continuing to take on more clients – some assigned and some new to the program. **Jason** will be 21 years with UORIS in February. Helping our clients plan for and live in retirement is still a rewarding experience. The relationships developed are even more important. From all of us, we wish you a joyful holiday and healthy 2023!

**UnitedOne Retirement & Investment Services**  
is here to help you make important financial decisions.

For information on your accounts or to schedule an appointment with Jason or Rob, please connect with Heidi at **920-652-2570** or **invest@UnitedOne.org**

**Jason R. Muench**, CRPC®, CFP®

**Robert A. Reindl**, LPL Financial Advisor

**Heidi E. Laux**, Program Coordinator



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