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# THE LOCKSHIELD LETTER

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VOLUME 2: 3RD QUARTER



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## LOCKSHIELD PARTNERS' 3RD 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.



## WELCOME TO OUR QUARTER THREE NEWSLETTER

### THE LOCKSHIELD LETTER

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The most rewarding and enjoyable part of our service is building life-long 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. We invite you to explore updates regarding our business, our ministry efforts, and also personal updates from our team members.

# BUSINESS UPDATES

**ECONOMIC UPDATE** During the quarter, the S&P 500 posted its third consecutive negative quarter. This is the first time that has happened since the housing marking crisis of 2008. The Federal Reserve continued its hawkish stance by increasing interest rates by 75 basis points for the third consecutive meeting. For more detailed information, make sure to visit the Library tab on our Lockshield Partners website, where we have blogs posted on these topics.



**STUDENT LOAN ANNOUNCEMENT** Several weeks ago, there were changes announced to the PUBLIC STUDENT LOAN FORGIVENESS Program (PSLF). Along with these changes, a one-time forgiveness of federal student debt was announced. For more information, check out the Library tab on the Lockshield website or call our office to see how these changes could impact you.



**LPL FOCUS CONFERENCE** Dan attended the 2022 LPL Focus conference in Denver this summer. More than 4,000 financial advisors attended the conference. Our team strives to focus on continuing education in order to provide first-class advice and service.



# WHERE DO YOU LOCKSHIELD?



Marianne D. clicking the button to officially retire and begin drawing her social security!  
Congrats Marianne!



Our long time friend and client Jude C. retired this past May and has wasted no time in enjoying her retirement. She is currently on the Camino de Santiago walking her way across northern Spain.



Jason B. enjoying Gulf Shores, AL.



Tyler soaking up the sun in Cozumel, Mexico.



Mervin T. spending some quality time with Dan.

# WELCOME TO THE LOCKSHIELD FAMILY



## **LOGAN SEXTON, STAFF ACCOUNTANT**

Born and raised in Metcalfe County, Logan Sexton is a graduate of WKU and earned a bachelor's degree in Finance. As an accountant at Lockshield Partners Accounting Services, he enjoys assisting with all of his clients' needs. "I aim to build strong relationships with all of my clients." In his free time, he enjoys golfing and being outdoors as well as spending quality time his friends and family.



## **BECKY REECE , OPERATIONS MANAGER**

Becky Reece joined the Lockshield Partners Accounting Services team in September 2022 as Operations Manager. With her years of experience in management and organizational processes, she looks forward to streamlining efficiency and helping the business to grow and flourish. Becky is a lifelong resident of Barren County and a graduate of WKU. She is engaged to Drew, and together they have 4 children. When she is not at work, Becky enjoys supporting her boys at numerous sporting events, traveling and spending time with family and friends.



## **CAILEE HERNANDEZ, BCHS CO-OP INTERN**

Cailee Hernandez, Senior at Barren County High School, is interning at the Accounting Services office through the co-op program offered at BCHS. She has been a tremendous help to our office and we look forward to continuing our work with the BCHS Co-op program.



# THE LOCKSHIELD MINISTRY



**STEP UP FOR DOWN SYNDROME WALK** Jodi supported Team Barren at the Annual Step up for Down Syndrome Walk at BG Ballpark on September 17th. The fundraising efforts will support local programs and services, as well as advocacy and public awareness initiatives that benefit all individuals with Down syndrome.



**KIWANIS CHARITY GOLF SCRAMBLE** Matt Flowers recently helped host the Kiwanis Charity Golf Scramble as Treasurer of Kiwanis and Drew Thompson participated.



# THE LOCKSHIELD FAMILY



The BG Jr. High Softball team needed an assistant coach this fall. Dan was more than happy to volunteer and spend that time with Natalie!



Becky Reece and Drew Thompson recently celebrated their engagement for their upcoming nuptials.



This August, Mom (Claire) and Grandma (Gail) moved John back into Maryville University in St. Louis for his sophomore year.



Matthew Klein, #83, plays tight end for the BGHS Purples. Dan has worked his way up to the chain gang and gets to enjoy the best seat in the house while "working" on the sidelines.



Trish recently visited with her daughter, Shawna, at Auburn University.



The Hayden's celebrating the wedding of Clark's younger brother, Andrew.



Jackson and Elizabeth Hayden were excited to be the ring bearer and flower girl at their Uncle's wedding.



Grant is proving to be a great cross country runner! He has placed in the top 5 of most of his races this year.



Jenna has had a great golf season with BGHS Lady Purples!



# THE LOCKSHIELD FAMILY



Jeremiah and his family took a vacation to Montana and Wyoming. They spent a lot of time hiking, rafting and fly fishing.



Jeremiah enjoying the day fishing in Montana.



Jeremiah's youngest son, Grant, played for the BG East All-Stars. Jeremiah was the Coach.



# THE LOCKSHIELD FAMILY



Lady Purples Golf Team qualified for the State Tournament. Only the top 9 teams in the state make it to this tournament. Go Purples!



Jodi enjoyed a family cruise throughout the Caribbean.



Grant also plays a lot of travel Baseball for the BG Braves 11U team. Coach Jeremiah and the Braves enjoyed a great season!

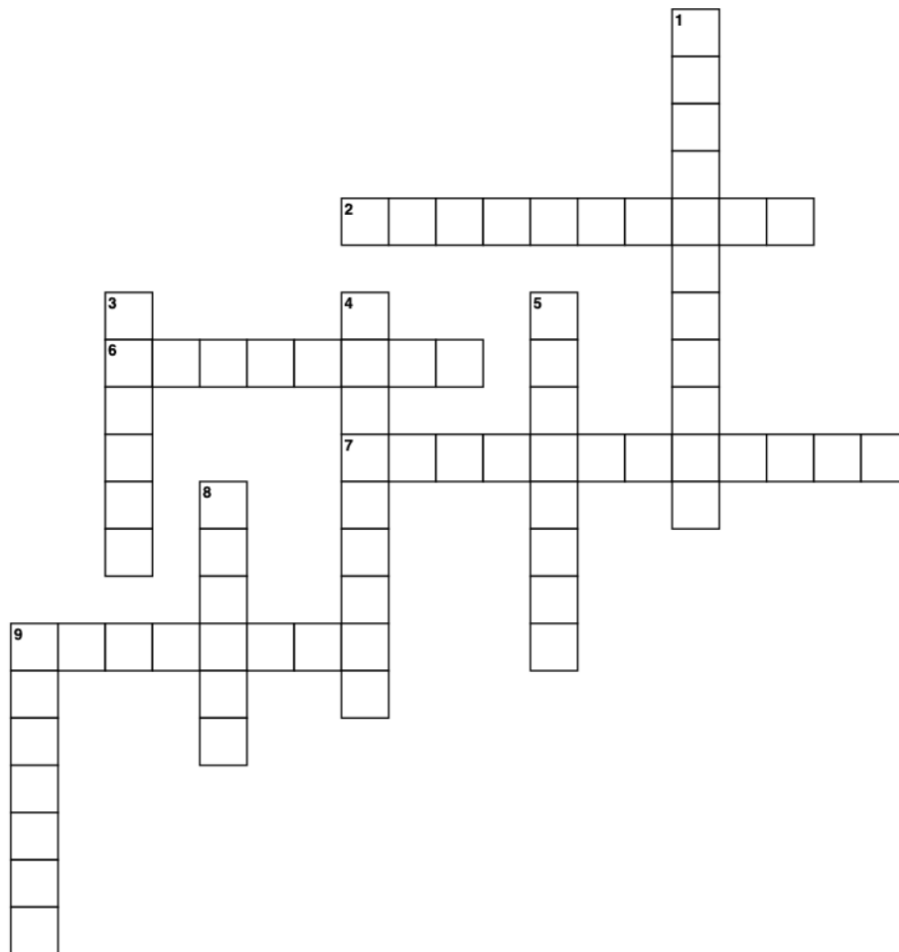


When Dan wasn't spending time on the latest social security or IRA tax law changes he was able take his two dates to a ballgame at Coors Field in Denver!

# TEST YOUR KNOWLEDGE

THE FIRST PERSON TO FILL THIS OUT CORRECTLY AND DELIVER TO THE OFFICE WINS LOCKSHIELD SWAG!

## Accounting Terminology



### Across

- [2] what is a process of keeping financial accounts?
- [6] a business's ability to pay debts
- [7] a person that has created a business
- [9] a person that extends credit to a company

### Down

- [1] amounts owed
- [3] objects that are of value owned by a business or person
- [4] people who provide capital for a company
- [5] the banks profit on a loan
- [8] net worth
- [9] a business requires \_\_\_\_\_ to function





# LOCKSHIELD —PARTNERS—

TOGETHER, WE PLAN.

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