

Hansen Team Newsletter

Hello!

Welcome to the first edition of The Hansen Team Newsletter. Our plan is to provide market and team updates, as well as timely and informative investment related topics. Our goal is to offer another means for us to stay connected, to share information, and cover topics of interest.

To begin, we'd like to introduce the members of the Hansen Team! Our Team photo below includes (from left to right): Front Row: Beth Tessar-Financial Planner, Colleen Dring-Senior Client Service Associate, Maureen Hansen-Senior Vice President, Financial Advisor, Sara Shaffer-Senior Client Service Manager, Keith Kuzera-Vice President, Financial Advisor, Candace (Candy) Kilford-Senior Client Service Manager Back Row: Randy Godsell-Senior Portfolio Manager, Pete Jelacic-Senior Vice President, Financial Advisor, Betty Cibulka-Senior Client Service Associate, Annmari Devinger-Senior Client Service Manager, Jay Neary-Financial Advisor, Nathan Cowen-Financial Advisor Not pictured, Mitchell Ahmad-Senior Portfolio Analyst and Trader

In This Issue:

- WEG Participates in National Volunteer Month
- Five Star Wealth Manager Awards Received
- Hansen Team Medicare Seminar
- HSAs: Covering More Than Just Healthcare Costs



Photo by: Natalie Sanchez Media

We'd like to thank you for taking the time to read our inaugural newsletter and would like to extend the invitation to share your thoughts, comments, and feedback!

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Hansen Team Volunteer Day

April was National Volunteer Month. WEG offices across the country had the opportunity to participate in WEG's Day of Service by volunteering at a local nonprofit organization. On Monday, April 22, six members of the Hansen Team spent the afternoon volunteering at Feeding America – Eastern Wisconsin Milwaukee campus. In addition to local partners, community leaders and pantries, Feeding America relies on volunteers to assist in getting food, hygiene items and other necessary household items into the hands of underserved individuals and households. The Hansen Team was eager to assist the organization and play a small part in their Mission, "To Solve Hunger". The team joined forces with additional volunteers from the community to help sort, pack, and pallet over 4,500 pounds of non-food items during our afternoon shift.

It was a fun day working alongside our colleagues and other community members to help make a difference. Nate Cowen, Financial Advisor and organizer of our office's participation in the event, shared "What a great all-around experience at our Day of Service!"



Between the satisfaction of assisting such an impactful organization like Feeding America, to the fellowship we all shared, we all agreed that we need to do this more often."

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Recent Awards and Accolades

We are delighted to share two honors that were bestowed on the Hansen Team and two of our Financial Advisors recently. We are proud of the effort put forth into helping our clients along their financial journey and we share in seeing goals achieved and dreams realized. We know that without the trust and confidence you place in our team these accolades are not possible. These awards do not drive our actions; however, they are the result of our team doing what is best for each and every client. We appreciate your continued support and partnership.

Growth Leader's Circle



We are pleased to announce that the Hansen Team received the Wealth Enhancement Group Growth Leaders Circle award for their growth performance in 2023. The Growth Leaders Circle Program was implemented across all WEG offices to recognize and celebrate advisor teams who are achieving strong growth results in their market. Our team-based approach and concentrated focus on getting clients closer to their financial goals has resulted in consistent growth year over year. Our commitment will always be to you and your wealth management experience.

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Recent Awards and Accolades (Continued)

In addition, we are excited to share that Maureen Hansen and Jay Neary received the 2024 Five Star Wealth Manager Award*.

Five Star Award



Maureen Hansen CLU®



Jay Neary III CFP®, CLTC®, CEPS, CSA®

Five Star Professional conducts thorough research to help consumers with the decision of selecting a service professional in their area. The Five Star Wealth Manager award program is the most widely published and largest award program for the financial services industry in the U.S.

Five Star Professional joins forces with Milwaukee Magazine to honor these professionals and recognize their achievements. This is Maureen's ninth year receiving this prestigious award and Jay's second year. Congratulations to both Maureen and Jay.



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Medicare Seminar

On Thursday, May 9, the Hansen Team hosted 25 clients at our annual Medicare Seminar. The presentation was tailored to clients between the ages of 60 and 65 who may be enrolling in Medicare.

We partnered with Leanne Cowles, Health Insurance Broker from Cowles Insurance Services, who shared a great deal of information about Medicare Parts A and B, timing of when to apply for Medicare, and information specific to Health Savings Accounts and the impact on Medicare benefits. Clients who attended found the information shared to be both insightful and helpful.

A critical part of our Advisor's role is to ensure clients are aware of these key milestones and are prepared for the next chapter. During annual client meetings Advisors will initiate discussions with those clients approaching these ages to ensure they are positioned well going into that period of life when they will need to apply for Medicare. If you have questions or would like to begin a Medicare/retirement discussion with your Advisor prior to your next meeting, please reach out. Our Advisors are prepared and happy to discuss.



Leanne Cowles



Allyson Cowles

Newsletter

Your HSA Can Cover More Than You Think

Did you know that HSAs can cover more than just health care costs? It's true: HSAs are powerful, versatile tools that can be used effectively in retirement planning. Many people overlook the HSA's potential beyond covering immediate medical expenses. With the right approach, you can leverage triple tax advantages and the potential for asset growth.

To help you make the most of your HSA, we've compiled essential tips and strategies for you in "How to Incorporate Your HSA into Your Retirement Plan."

[Click Here to Read More](#)

The Hansen Team

Again, thank you! Your trust and confidence have been instrumental in our success, and we are truly grateful for your continued partnership.

Thank you for reading the first edition of our team newsletter. We hope you found the information insightful.

Please reach out to our team if you have any questions, comments, or concerns.

Know somebody who would appreciate a free consultation?

[Click Here to
Share Their Info](#)

*Award was issued on 12/1/23 for the time period 2/13/23 through 8/31/2023. Award criteria based on 10 objective criteria associated with providing quality services to clients such as credentials, experience and assets under management among other factors. Wealth managers do not pay a fee to be considered or placed on the final list of 2024 Five Star Wealth Managers. Advisory services offered through Wealth Enhancement Advisory Services, LLC, a registered investment advisor and affiliate of Wealth Enhancement Group®.