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Wealth Management from a Biblical World View since 1978

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Staffing Update

There have been a number of staffing developments here at The Life Group that we wanted to let you know about.



First, we are excited to welcome Karen Funk as an addition to our support staff. Karen will serve as our new administrative assistant. She will be in charge of our operation support, providing excellent service to all of our clients. She works closely with the advisors, helping them complete and process paperwork, as well as fielding phone calls and solving problems. Karen attended Pensacola Christian College where she studied music/voice, in addition to the Stratford Institute where she studied Interior Decorating. She has years of customer service and sales experience working at a family-owned furniture store.

Karen and her husband James attend [Maranatha Baptist Church](#). She is very much involved in music and drama ministries at her church. Karen loves spending time with her husband and cat, as well as reading, bargain shopping at yard sales, decorating, and gardening.

Second, Dana Iverson, our current administrative assistant, is changing roles. She will be handling our client communications. This means that among other things, she will be contacting clients on behalf of their advisor to schedule meetings and provide service.



Finally, we are saying goodbye to a long time friend and pillar of The Life Group. Michelle Hackman, our office manager and tax advisor, is leaving effective July 8th. She is stepping out to pursue other opportunities, as well as spend more time with her children and grandchildren. We are sad to see her go but wish her all the best with whatever God calls her to."

A message to our Tax Clients: Michelle has done much to build our tax office to where it is today and we plan on building on the strong foundation that she has left. Our desire has been to hire a CPA to not only work with our clients but also to work with churches and businesses in a variety of ways. We have offered the position to someone who meets and exceeds our expectations. Over the coming weeks we will introduce her to you.