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A Registered Investment Advisory Firm

**September 2016**

### **Saying Goodbye and Hello**

Businesses grow chiefly by expanding their customer base with product innovations. That's obvious. But it is less often noted that entrepreneurial businesses also grow because their employees, managers, and owners grow in experience and expertise. They see clearer, they work smarter, and their contributions can transform the enterprise.

That has been our story with Client Service Associate, Samantha Abell. She joined DH Financial in 2013 with her Associates of Behavior Science degree from Citrus College. A great listener, she has personalized the client service experience and built close relationships with clients. With her ability to empathize, Samantha has learned to talk family news or vintage cars with the same care and sensitivity she brings to gathering answers to complex retirement plan questions and tenderly assisting a family through a death claim.

Samantha's pleasant persistence has earned her compliments like, *"Thanks for being so diligent in following up—we appreciate the extra effort from you and the team."* She can also take charge of technology details, and tight deadlines never faze her. As Samantha looks back on her growth in the realm of client services she says, *"What I find most rewarding is working with our clients by finding the best solutions for their personal situations."*

Now Samantha prepares for a special transition that started with a recent announcement in May 2016, *"The best weekend of my life so far! Steve and I are officially engaged! I can't wait to marry my best friend."*

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That wish comes true in October, and our wish is that her wedding to her fiancé, Steve, and her move to Bishop, CA, brings her all the happiness she deserves. She has been a friend to all of her team members, and her excellence in client services has had a significant impact on the growth of our firm. She will be missed dearly.

If you would like to send her your own best wishes, you may reach her at [samantha@dhfinancial.com](mailto:samantha@dhfinancial.com) until September 22nd.

Meanwhile, we look forward to our firm's next transition by welcoming Darlene Ortiz in the role of Client Service Associate ([darlene@dh-financial.com](mailto:darlene@dh-financial.com)).

Darlene brings ten years of experience in financial counseling to our clients. She is also in pursuit of her Business Administration degree at Chaffey College and enjoys spending time with her daughter, hiking, traveling, and playing soccer.

She is enthusiastic to meet you and assure you of her commitment. First, to make sure every client service experience is personally gratifying and, second, to complete every detail to the highest professional standard. We know this transition will be smooth and productive, and we will support Darlene's growth in the client services role in every way possible.

We don't think of service as what we do. It's who we are. It's our way of doing business at DH Financial.

Best regards,  
David A. Hjorth, CLU, ChFC, AEP – Partner  
Nicholas D. Hjorth, CPA, CLTC – Partner  
Joanna L. Denny, CLTC - Director of Operations

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