



Job Promotions as Reed Financial Services

Effective June 4, 2013

I am excited to announce that Amanda Lisachenko has been promoted to Chief Operating Officer of the firm, responsible for the day-to-day operations. This is not new for Amanda. She actually has been doing this job for the past several years. This is recognition of a “job well done.”

Today, the increasing complexity of our business and the increased needs of our clients require a wide range of knowledge and experience to be successful. Amanda has been with me nearly 15 years (and is under age 40), has developed strong people skills and is excellent at planning and investments research. Recently, she was named a Five Star Wealth Advisor by *Cleveland Magazine/Inside Business*, a distinction given to less than 4% of all advisors in the industry. She shares my philosophy of doing whatever it takes to help our clients achieve their goals and dreams, and I think this distinction reflects her talents. She also has contributed to our growth since joining the firm in 1998. We have tripled our assets under management, doubled the staff and we have become leading edge in the use of technology in helping our clients achieve their goals.

I am also happy to announce that John May has been promoted to Manager of Planning and Investment Management. John’s responsibilities include all planning, update preparation, investment research, trading, rebalancing and monitoring of all investments and client portfolios for appropriate results and proper asset allocation. John has been with us for five years – another “next gen” employee – and does an excellent job in these areas. He takes a tremendous amount of work off Amanda, freeing her to spend much of her time helping clients. And, Henry On was added as an analyst to assist John with these very important responsibilities.

With all of these great individuals assuming more responsibilities, one might ask “what is Jim doing?” My business coach taught my staff and me that the most successful and effective organizations succeed when everyone does what they do best and contribute at a high level.

My strength is helping clients develop a plan to achieve their goals and dreams, and to assist in maintaining a comfortable lifestyle throughout their life’s journey. Historically, I also was responsible for handling the details of making the goals a reality. Now our great staff handles much of these details.

This extra time allows me to focus on investment research which has helped us weather these challenging times with results better than most, develop and train our staff, provide strategic vision to help the firm grow and navigate the choppy regulatory environment facing our industry.

Bottom line, I do not plan to retire anytime soon, God willing. I do acknowledge that I play more than I used to and that I am not a fan of cold weather. The wonders of technology, however, have allowed me to keep in touch with my staff and clients from nearly anywhere in the world, and to work whenever or wherever I am, much to the chagrin of my staff.

When you get a chance, please congratulate Amanda and John on their accomplishments and welcome Henry.

Sincerely,

A handwritten signature in cursive script that reads "James M. Reed".

James M. Reed, CPA, CFP®