

Premier Insider



A ROCK STAR TEAM!

During the recent annual meeting, I made sure to express my gratitude to my team for their exceptional work in organizing and executing a successful event. Lately, I have been singing praises about my team, and you can expect to hear me continue to do so for the foreseeable future. I understand the challenges of having disruptive team members who do not blend in or cooperate well. When you finally have a cohesive team that works seamlessly together, it is crucial to cherish and protect that dynamic!

I have encountered various employees throughout my career, some exceptional and others not so much. Some were skilled at their jobs but lacked people skills, while others showed potential but fell short of expectations. Reflecting on what sets this current PWM team apart from its predecessors, I believe our more rigorous hiring process plays a significant role. We seek individuals who not only have the necessary skills but also align with our business values.

So, what distinguishes a good employee from a rock star? In my view, it comes down to the following traits:

- **Initiative:** They eagerly and enthusiastically step up when tasks need to be completed.
- **Conscientiousness:** They strive for excellence, assist their colleagues, and treat others with kindness and respect.
- **Productivity:** They are proactive in getting things done, even when a task is outside their usual responsibilities.
- **Communication:** They express their thoughts and concerns professionally and enjoy collaborating with the team.
- **Adaptability:** They are open to change and willing to try new approaches for the betterment of the business.
- **Drama-Free:** They avoid creating unnecessary conflicts or disruptions, maintaining a positive and calm work environment.
- **Optimism:** They maintain a positive outlook, even during challenging times, recognizing that tomorrow is a new opportunity.

I am thrilled to introduce our newest Rock Star, Jennifer Browning, who has joined us as Client Services Liaison. In this role, she will work closely with Sebastian and the client services team to oversee all aspects of our client relationships.

Jennifer lives and works in Maryland. She is married with two children and has an extensive background in the financial services industry. Please feel free to reach out to Jennifer directly and give her a warm welcome to the team! I am sure she would love to hear from you!

HAPPY OCTOBER!

TEAM NEWS!

Last month we requested pictures showcasing your office staff.....

We received a few good ones!



The GOAT of the Miles Financial Services team!

Jan Miles is the glue of this organization!



Eric Gilroy, Tracy Troutman *and* their families took a "corporate retreat" to the Hyatt Regency Chesapeake Bay Resort in Cambridge, MD.

Adults from left to right: Eric Gilroy, Nina Gilroy, Tracy Troutman, Michael Troutman

Kids from left to right: Bella Gilroy (8), Quinn Gilroy (10), Natalie Troutman (10) and Abby Troutman (13). Yes, those

are matching dresses. 😊 Quinn and Natalie, are the best of friends.

This is a team (and family) that works together *AND* plays together!



Here is the PWM "behind the scenes" team.

Webinars:

October 8, 12:30PM

Understanding the Secure Act 2.0 RMD Rules. Kevin Hughes from the Hughes Group will be sharing.

[REGISTER HERE](#)

October 10, 10:00AM

Estate Guru is an innovative software solution that connects attorneys with advisors enabling a streamlined estate planning process, providing value to the advisor's clients, and allowing advisors to expand their services and grow their practice

[REGISTER HERE](#)

October 29, 10:00AM

Understanding Your Fiduciary Responsibilities: A Consultation with Compliance

[REGISTER HERE](#)

October Birthdays

Bryan Trugman

Tripp Freeman

Geoff Tomasetti

Phil Buchanan

Ravi Narayan

Ryan Breen

Ted Derrick

Vipul Mallick

Save the Date!

September 4-5, 2025

Annual Meeting at Hershey.

Industry Information

[Crafting Connection: How to Tell Your Small Business Story | CO- by US Chamber of Commerce](#)

[The Importance Of Authenticity In Financial Advising - Articles - Advisor Perspectives](#)

[4 Tips for Advisors Struggling With Procrastination \(etftrends.com\)](#)

Friendly Reminders

[Pershing Paper Fee in Effect for 2024 Tax Documents \(cir2.com\)](#)

[CoveredAdvisor Enrollment Period Now Open \(cir2.com\)](#)

[Keyword Directory Section Now on cir2.com](#)

Next month we will be showcasing your best Halloween pics!

Send us those children and grandchildren shots!