

# summaries



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## FRIENDS ARE THE FAMILY YOU CHOOSE – JESS C SCOTT

The very first person I met at Sigma Investment Counselors in 1984 was Nancy Kunkel. She worked directly for our founder, Chuck Ricker, CFA. At that time, she had been with the company for about 5 years.

Flash forward nearly 35 years and Nancy is approaching almost 4 decades at Sigma. Consider the rare circumstances wherein someone spends virtually their entire career at one company. It's almost unheard of. That commitment and loyalty is beyond commendable.

Alas, she has decided that the time has come for her to spend more time with her dear husband Lou and therefore, will retire at the end of the year. But, what a career she has had!

Over the years, Nancy befriended scores of co-workers and clients. She served as marriage counselor, grief counselor, investment counselor and all around go-to person for many clients. She also trained several of her colleagues.

The diligence with which she pursued client satisfaction was a benchmark that we have strived to replicate and achieve throughout the firm. In our 34 years of working together, I cannot recall a single client complaint received about her service or conduct. That too is almost unheard of. Much of that is because of her cheery attitude, modesty, hardships overcome, and blessings bestowed.

Needless to say, over the years, Nancy became a good friend to me. She walked with me through births of children and grandchildren, deaths of parents and other family members, sickness and other difficulties, and was steadfast in support.

I will be forever grateful for the significant role she has played through the evolution of Sigma, the manifold systems upgrades, office relocations, procedure changes, market crashes and organizational changes. It is probably unique in a corporate environment for friendships to evolve from manager/subordinate relationships, but it is an aspect of my tenure at Sigma that I will forever cherish. Nancy is a unique individual and she will forever command my love and respect.

Nancy – on behalf of all of us at Sigma, thank you for the very important and valuable role that you have played in our lives! Enjoy your well-deserved retirement!

Robert M. Bilkie, Jr., CFA  
Chief Executive Officer

local independent personal accessible

interactive creative local independent personal

knowledgeable thoughtful ethical experienced

## **BARB - WE WILL MISS YOU**

I joined Sigma nearly 20 years ago. For 18 of those 20 years, Barb has been assigned the task of handling the operational and administrative tasks of my clients. Well, I reluctantly accept the fact that “all good things must come to an end”. Yet, Barb has certainly paid her dues and it’s time to spend quality time with her husband, Robert, her two children, and large extended family.

As I reflect on my tenure at Sigma, I attribute much of my success to Barb. Her constant smile, laughter, positive attitude and caring spirit comes naturally to Barb. Her ability to work under pressure, multi-task,

attention to details and accuracy are also trademarks worth noting. When I queried my colleagues at Sigma, other characteristics included her professionalism, kindness, honesty, gracefulness, and dependability. While I must say good-bye, I am most grateful for my friendship with Barb. She not only served my clients, she was my sounding board, cheerleader, mentor and coach.

So, while it is time to bid adieu to Barb on a professional level, I look forward to nurturing the personal friendship that has evolved over the years with Barb and Robert. I pray that they can enjoy many healthy years ahead and I am privileged to call both my friend.

Christopher J. Kress, CFA  
Executive Vice-President