

# summaries



the official newsletter of sigma investment counselors

June 2017

## We're Growing!

In the three plus decades that I have been serving clients at Sigma Investment Counselors, the nature of my practice (and, I believe, that of my similarly tenured colleagues) has changed considerably. In 1984, Sigma Investment Counselors was known primarily as a "stock picking shop". Today, our services run the gamut but are largely focused on wealth planning. In addition, with an influx of new clients referred by existing clients, centers of influence, and a referral program supported by Fidelity Investments, assets under management are now approaching \$1 billion.

Due to this growth and broadening of services provided, as well as the increasing utilization of technology for security and efficiency, the general staffing and professional skill sets at Sigma have evolved. New positions recently created include Director of Wealth Planning, Chief Operating Officer and Paraplanner.

I have split my own duties, now serving as the firm's Chief Executive Officer and as an Investment Advisor. I will no longer be filling the role of President. My focus will be on recruiting, mentoring and retaining our investment advisors, wealth planning for clients and financial/economic analysis.

Operations oversight will now be led by our newly assigned President, Shari Bilkie, IACCP®. As many know, Shari is my wife of 34 years and has been with Sigma for almost thirty years, serving in numerous capacities including Chief Compliance Officer (a role she will continue to fill). She has also played a vital role to me as a sounding board and advisor during her tenure. Shari's new responsibilities will include the direction of the firm's financial goals, objectives,

budgets and organizational structure along with the implementation of the firm's vision and strategic leadership.

Our new Director of Wealth Planning is Christopher Frayne, CFA, CFP®. Having joined Sigma full time 10 years ago after graduating from the University of Michigan, Chris has served in a number of roles including investment research, systems development and implementation, equity and fixed income trading, and most recently as an investment advisor to clients. By adding the Director of Wealth Planning role to his current responsibilities, Chris will be tasked with the ongoing development and implementation of internal processes to ensure that Sigma is able to meet the broad range of its clients' ever-changing wealth planning needs.

Our Chief Operating Officer is our long-time Director of Operations, Tamika Hall. Tamika joined Sigma in 2008 and has over 20 years of experience in the areas of finance and operations management. She has a broad range of responsibilities, including managing information technology, data security and administrative support services, as well as developing marketing strategies to meet organizational objectives. Tamika will continue to fulfill these duties as Chief Operating Officer in addition to managing the new team of Paraplanners. She will also be responsible for spearheading strategic initiatives focused on the development, communication and implementation of operational infrastructure systems.

Shari, Chris and our Chief Investment Officer (Denise Farkas, CFA) will all report to me.

local independent personal accessible  
interactive creative local independent personal  
knowledgeable thoughtful ethical experienced

Finally, we have assembled a team of Paraplanners. A Paraplanner participates in client meetings and provides technical support to the Investment Advisor in the delivery of advice to clients. Their responsibilities include data gathering, financial modeling, case design and plan presentation development.

They have expertise in using a robust internet based wealth planning modeling application called MoneyGuidePro. This application serves as the centerpiece in advising many of our clients. The model uses sophisticated probability analysis to test for the likelihood of clients not achieving their lifetime wealth goals. In addition to these responsibilities, Paraplanners are involved in securities trading, securities research and fixed income management support.

Filling the roles of Paraplanner are **Amanda Lehnert, Daniel Robinson and Hannah Voigt**. Amanda joined Sigma in 2015 while Hannah and Daniel are recent college graduates. We are pleased to have all of them on our team. Their biographical information is provided below.

**Amanda Lehnert** - Amanda joined Sigma in 2015. She is a graduate of the University of Michigan and will be sitting for the Certified Financial Planner (CFP®) certification examination in November. Amanda is a member of the Investment Committee

of the Arab Community Center Economic and Social Services (ACCESS) organization and a board member of the Miracle League of Plymouth, a non-profit special needs baseball program. She is married and, after having lived in Europe for three years, now resides in Northville, Michigan with her husband and two daughters.

**Daniel Robinson** - Daniel joined Sigma full-time in 2017 following two years as a summer intern. Dan recently graduated from Central Michigan University, where he obtained a Bachelors of Science in Business Administration degree in Personal Financial Planning. He will be sitting for the Certified Financial Planner (CFP®) certification examination in November.

**Hannah Voigt** - Hannah joined Sigma in 2017. She graduated from the University of Wisconsin-Madison, with a Bachelors of Arts degree in Economics. Prior to working at Sigma, she served as an Intern at the Wisconsin State Capitol and at the Madison Senior Center. Hannah plans on sitting for the Chartered Financial Analyst (CFA) designation.

As always, we appreciate the confidence our clients have entrusted in us. It is an honor and a privilege that we do not take for granted.

Robert M. Bilkie Jr., CFA  
Chief Executive Officer

Please remember to contact Sigma Investment Counselors if there are any changes in your financial situation or investment objectives