

summaries



the official newsletter of sigma investment counselors

May 2024

SIGMA STRIDES!

We recently celebrated the 25th anniversary of employment at Sigma Investment Counselors for our esteemed colleague, Marisa Bradbury, CFA, CFP®. Marisa is well regarded at Sigma based not only upon her success at advising clients, but also for the leadership roles that she has played at Sigma, the CFA Society of Detroit and the FPA of Central Florida. Congratulations, Marisa!

In addition, in late April we learned that our colleague Genadi Slavov, who joined us last fall, earned his CFA Charter and, accordingly, we updated his biographical information on our website.

Also in April, we welcomed the newest member of our professional ranks when Dominic Norko, CFP® joined the team.

Finally effective May 1, 2024, we updated the biographical information on

our website for Michael Mullenax, CFP® (hired full time in 2022) as he passed his examination and accumulated the requisite work experience to allow him to use the credential. That gives Sigma eight CFA Charterholders and six CFP® credentialed professionals (three of our colleagues hold both designations). This brings the total number of wealth advisors working with clients, or eligible to do so, to nine (the entire team numbers 20).

Needless to say, we place a high degree of emphasis on credentials at Sigma. That is not to say that we ONLY hire credentialed professionals, however. We recognize and appreciate exceptional competency and expertise when we encounter it. Experience counts. We believe that a combination of credentials and demonstrated proficiency can greatly benefit our clients and our team.

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

As is probably evident, this exercise in building a team and instilling a culture of exemplary client service at Sigma is a goal that we strive for. We benchmark our success simply – by measuring whether we are retaining our clients and also adding new clients (at a controlled pace). We are pleased to report that we rarely lose clients – in the last 16 months our attrition rate was under 2% and this includes deaths and divorces. In the meantime, we have continued to regularly add to our ranks of clients.

We do not take lightly the critical role we play in our client’s financial lives, the heavy responsibility we bear, and the immense sense of satisfaction that we take when our client’s objectives are regularly and demonstrably being met. We are appreciative of the opportunity that we have to serve!

Robert M. Bilkie, Jr., CFA
CEO

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