

# Personal Finance

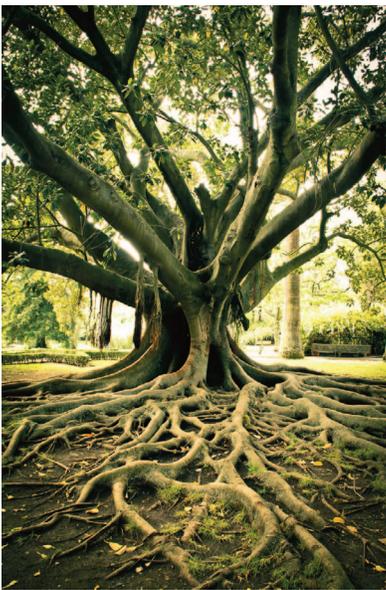
*Did you know?*

Investing in a Good Life  
MCKINLEY CARTER

(866) 306-2400  
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## “You Get Me!” Deep-rooted Client Relationships Shape our Service Landscape

The foundation of any relationship is trust. This is true at the very earliest stages of life and is, in fact, a critical part of the very first year of development with an infant, when they learn to trust or mistrust those who take care of them.



Fast forward to adult years...Relationships are more complex with business and personal responsibilities, interests, goals — in all of which, others play a role to some degree.

Recently we, at McKinley Carter, devoted a full day to business planning highlighted by a deep-dive into service excellence. We spent a significant portion of the time talking about what makes us different in the marketplace — that is, the depth of our client relationships. We aren't focused on the quantity of clients we serve, but rather on the quality of those relationships.

Simply put, we want to know you. We want to understand what motivates you, what keeps you awake at night, what legacy you want to leave behind for your family, friends, community, and more. It's our mission to help make sure those most treasured people, entities, pets, and/or causes in your world are well taken care of — to your complete satisfaction.

As I write this, I think fondly of clients I have had the privilege to work with directly or indirectly throughout my career at McKinley Carter. I can honestly say, I care deeply about those individuals, their families, and their well-being. Over the years, I've celebrated their joys and milestones, and I've cried with them when life took a tragic turn. I've seen those same emotions among my colleagues as well.

It's just what happens when you care about someone and have built a deep, trusting relationship. It's what happens when someone is considered family.

*- continued, reverse side*

Author

**Teresa Shawver, FPQP™**  
Advisory Service Standards  
Manager



Teresa Shawver is Manager of Advisory Service Standards and also serves as Assistant to the Director of Advisory Services for McKinley Carter Wealth Services.

She began her career in the financial services industry 20 years ago, starting in trust administration and investments at Chase Bank (then Charleston National Bank). Then she began a long-time career with Kanawha Investment & Trust Company as the Chief of Operations. When KI&T merged with McKinley Investment Group to form McKinley Carter, Teresa served as the Assistant Director of Operations until 2009, when she decided to take a couple years off to spend time with her young daughter.

Two years later, she rejoined the firm in her current role to design, coordinate, and implement standard practices among the Advisory Team. She also leads a team of Client Coordinators.

Teresa attended American Institute of Banking, Ohio Trust School, Cannon Financial Institute, and WV State College. She also completed the College for Financial Planning's Financial Paraplanner Qualified Professional™ designation program.

MCKINLEY CARTER WEALTH SERVICES

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As I sat in that business planning meeting a few days ago, listening to advisors speak so enthusiastically about helping clients reach their life goals, it was obvious to me that this truly is our life passion. We aren't selling products for commission, nor do we always win the business.



But we do very much pride ourselves on a relationship-driven approach to our advisory work — one that engages the client as an active partner, and one where we serve as a trusted fiduciary, confidante, and friend.

The level of detail and understanding for which we strive is only possible through a mutual commitment of time and trust. We know the value of our clients' time, and we appreciate the time they invest with us to meet periodically. For us, understanding what has changed in their lives (whether it's career, new grandchildren, health, new hobbies/interests, etc.) keeps us in touch with what's most important to them today, and

tomorrow.

It's how we distinguish ourselves, and what we enjoy most about what we do. At every opportunity, we want to be able to say, "We get you!"



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