



## Letterhead and Envelope

## Business Cards



Dear Valued Client,

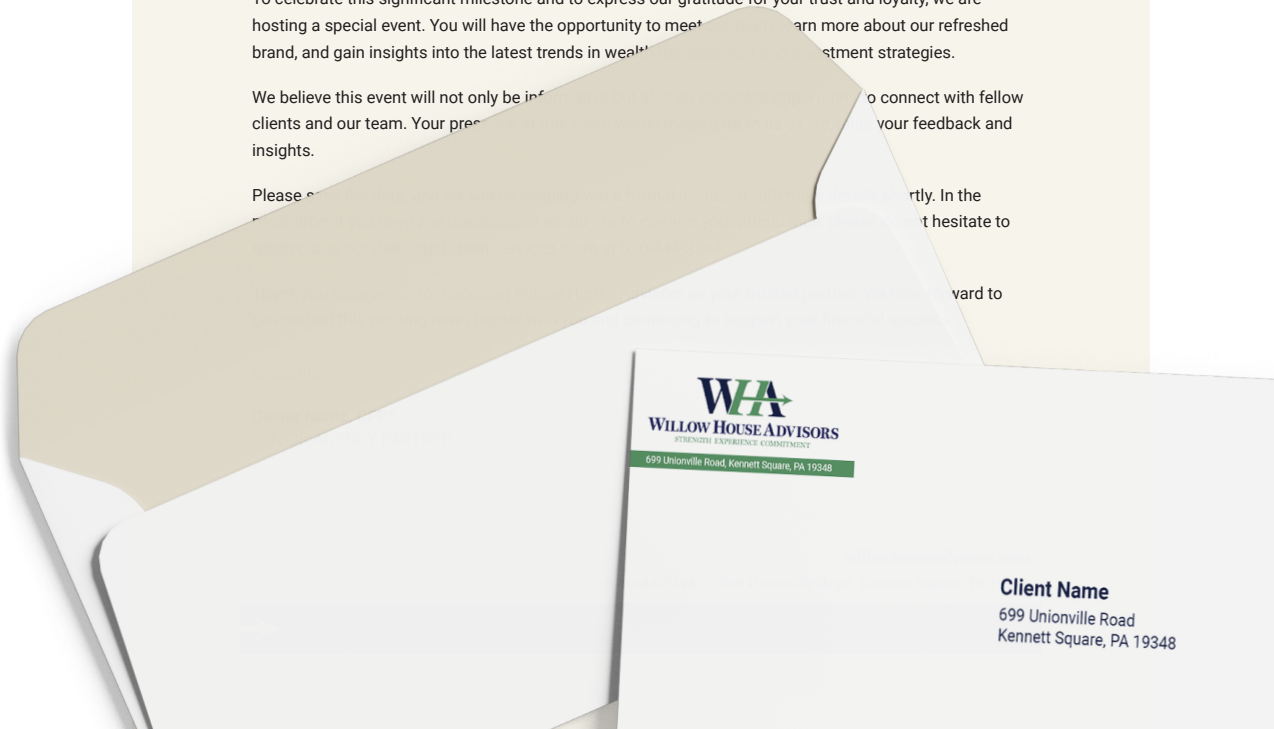
I hope this letter finds you in excellent health and high spirits. At Willow House Advisors, we constantly strive to provide you with the best financial services and solutions to help you achieve your financial goals. Today, I am excited to share some exciting news about our firm that reflects our commitment to excellence and innovation.

We are thrilled to unveil our new logo and branding for Willow House Advisors. This new visual identity encapsulates our core values, dedication to your financial success, and the growth and evolution of our firm. The logo is a symbol of our unwavering commitment to providing you with the highest level of wealth management expertise and personalized service.

To celebrate this significant milestone and to express our gratitude for your trust and loyalty, we are hosting a special event. You will have the opportunity to meet with us to learn more about our refreshed brand, and gain insights into the latest trends in wealth management and investment strategies.

We believe this event will not only be informative but also a great opportunity to connect with fellow clients and our team. Your presence is highly valued, and we encourage you to provide your feedback and insights.

Please contact us at [redacted] to register for the event. We look forward to seeing you soon. In the meantime, please do not hesitate to reach out to us with any questions or comments. We are always here for you. Sincerely,  
[redacted] Advisor to



## The Journey of Shaping Your Financial Future Begins Here

Your Goals must live in the heart of your Financial Plan if it is going to be built to last. We can provide a voice to your future to inform how you manage your financial resources today.



## Client-Focused Financial Planning

We're a team of financial professionals that believe our clients are best positioned to realize their goals when engaged in a collaborative ongoing relationship, centered in dynamic planning and advocacy.

[Start Planning with Us](#)



## Suite of Services

We are a client-focused financial advisory firm specializing in building generational relationships. We facilitate the alignment of our client's vision, values and objectives by creating a dynamic roadmap designed to achieve their optimal future. We work with those who value our expertise, relatable approach and holistic process—celebrating with our clients as they enjoy achieving their goals.

[See All Services](#)



Financial Planning



Investment Services



Retirement Planning



Personal Finance



Risk Management



Estate Planning



Tax Management



Education Planning



Charitable Planning

## Same People, Generational Vision

As a team we have been active in the financial services industry in Pennsylvania since 1971. Originally with Wenken & Associates, which developed into the uFinancial Group, now, our team, as the firm Willow House Advisors, looks forward to serving you and those you care about for years to come.



610-444-3344

699 Unionville Road, Kennett Square, PA 19348

Securities, investment advisory and financial planning services offered through qualified registered representatives of MML Investors Services, LLC.

Member SIPC. Supervisory office: 100 Sterling Parkway, Suite 307, Mechanicsburg, PA 17055. (717) 791-3300. Willow House Advisors is not a subsidiary or affiliate of MML Investors Services, LLC. CRN202611-5223784

Check the background of your Financial Services Professional on [FINRA's BrokerCheck](#).

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Business Cards

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 Dreamer & President

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**LTW**  
 ERGONOMIC SOLUTIONS

INDUSTRIALLY HEIGHT ADJUSTABLE ERGONOMIC TABLES, WORKSTATIONS, CARTS, OPERATOR PLATFORMS, AND MORE FOR OVER 25 YEARS.

Notes:

Line Card

**LTW**  
 ERGONOMIC SOLUTIONS  
 The Gold Standard

# People-Chosen Industrial Ergonomics

★★★★★

**BASES / TABLES**  
 E1 Dimensions up to 36" W x 36" D, lifting up to 550lb. E2 & E2-C lifting up to 2000lb. E6H Customizable dimensions, lifting up to 1100lb.

**WORKSTATIONS**  
 E1 WS Dimensions up to 36" W x 36" D, lifting up to 550lb. E4 WS Dimensions up to 120" W x 48" D, lifting up to 2200lb.

**PLATFORMS**  
 CHARIOT Dimensions up to 48" W x 24" D, lifting up to 1100lb. FIXED STEPS ADJUSTING STEPS Dimensions up to 2200lb.

**RETROFITS**  
 E2 RF Fits applications up to 72" W. E4 EP Fits applications up to 120" W.

**RCT LINE**  
 Dimensions up to 72" W. RCT-RL Cart Bases with RCT-WS

**Workstations**  
**Tables**  
**Machine Bases**  
**Operator Platforms**  
**Retrofit Kits**  
**+ MORE**

**www.LTW1.com**

Phone: Sales@LTW1.com  
 Email: Sales@LTW1.com  
 Address: 311 S. Paw Paw St. Lawrence, MI 49064  
 Patents listed on our website: www.LTW1.com/patents



# Web Design



# Copywriting

**Google Ads**

View (2 filters) **All campaigns** Campaign **LTW Products** Ad groups (10) **Select an ad group** Change view

Enabled [More details](#) Campaign 1 of 3

Overview Custom Aug 31 – Sep 29, 2023 Show last 30 days

Recommendations

Insights & reports

Ad groups

Ads & assets

Keywords

Audiences

Content

Settings

Clicks **565** Impressions **23.2K** CTR **2.44%** Avg. CPC **\$0.25**

Google Marketing

**Analytics** All accounts > LTW Ergonomic Solutio... **LTW Ergonomic Solutions - ...** Try searching "how to activate Google signals"

All Users [Add comparison](#) This year (Jan – Today) Jan 1 – Sep 29, 2023

**Reports snapshot**

Users **12K** New users **12K** Average engagement time **0m 57s**

**Insights**

- INSIGHT** Users for the screen class "E2 Workstation - Height Adjustable Workbench - LTW Ergonomic Solutions" spiked From September 17 to 23, 2023
- INSIGHT** Event count for users who triggered "scroll" spiked On September 22, 2023

[View all insights](#)

**WHERE DO YOUR NEW USERS COME FROM?**

New users by First user default channel group

Channel Group	Users
Organic Search	~4.5K
Direct	~3.0K
Paid Search	~2.8K
Cross-network	~1.5K
Referral	~0.5K
Organic Social	~0.2K
Display	~0.1K

[View user acquisition](#)

**WHAT ARE YOUR TOP CAMPAIGNS?**

Sessions by Session default channel group

SESSION DEFAULT CHANN...	SESSIONS
Organic Search	6.3K
Direct	3.9K
	3.2K
	1.8K

**Users by Country**

COUNTRY	USERS
United States	7.1K
India	1K
Canada	511
China	361

**HOW ARE ACTIVE USERS TRENDING?**

User activity over time

30 DAYS **1.5K**

7 DAYS **357**

1 DAY

Product Videos



Visual Inspection Workstation | Ergonomic Electric Height Adjustability | LTW Ergonomic Solutions



LTW Ergonomic Solutions (Lanphe...  
93 subscribers

Subscribe

Share

Download



Video Stills





Brochure



# Firm Introduction

Liberty Financial Strategies is a wealth management firm that aligns our client's financial world with their life, goals and priorities.

We offer a unique relational connection while helping create a comprehensive strategy, enabling our client's peace of mind. We accomplish this through an intentional process as a dedicated team that understands our fiduciary responsibility. Through our transparent and holistic partnership, our clients value their new level of clarity and confidence. We serve our clients by understanding their objectives, mapping out a pathway and tracking progress towards their meaningful goals. This helps our clients navigate both the anticipated and unanticipated seasons of life.



We are a Wealth Management Team anchored in relationships, providing clients with a better quality of life and peace of mind throughout the seasons of their lives. We discover the needs and wants of our clients, guiding them towards their desired goals and outcomes, empowering them to achieve greater levels of financial freedom.



## GUIDING PRINCIPLES

We believe our clients lead higher quality lives when they plan for the expected and prepare for the unexpected. At Liberty Financial Strategies, our greatest satisfaction and fulfillment occurs when we utilize our team, talents, and tools to help our clients make unique and meaningful progress.

### ADVISORS

#### A. Wesley Carr, Jr., ChFC, CFPS FINANCIAL ADVISOR



Bio content here, 60-85 words. Wes is married with two sons and currently resides in Lancaster. During his personal time he is an avid reader, rides dirt bikes, and hunts. Wes attended Messiah College and received a BS in Engineering with emphasis in Mechanical Engineering. He regularly attends various educational meetings on the subjects of retirement planning, investment management, estate planning, and business succession.

#### Andrew Sedora FINANCIAL ADVISOR



Bio content here, 60-85 words. Andy is passionate about helping families and small businesses prepare for and navigate through life events by maximizing their financial prospects. He graduated from West Chester University with his Bachelor of Sciences degree. As a father of four, Andy understands how important it is to properly budget to achieve long-term goals while striking a balance with immediate needs.

#### Clinton Simmons FINANCIAL ADVISOR



Bio content here, 60-85 words. Clinton cares deeply for the financial well-being and success of his clients. He works hard to master his craft to help clients realize their dreams and wisely plan for the future. He has a Bachelor of Science degree from Messiah College and a Master of Science degree from St. John's University. With two young children, Clinton realizes the continual need to balance the many aspects of one's life.

#### Paul Broomell FINANCIAL ADVISOR



Paul is married to his beautiful wife Melissa with one son and more children on the way! He can be found spending time with his family, golfing, playing basketball, hunting at the cabin, or relaxing at the beach. He graduated from Messiah College with a degree in Business Administration. While at Messiah College he played baseball there for 4 years as a pitcher. He also loves to travel the world, and has been to many countries on missions trips.

libertyfinancialstrategies.com

Liberty Financial Strategies

Social Media Graphics

**"I've gotten to know Blain during the past couple years. I have a ton of respect for him both personally and professionally."**

**FINANCIAL ADVISOR**  
Wealth Management Firm | Nashville, TN




PROVINCIAL DEVELOPMENT GROUP  
optimizing opportunity  
provincialdevelopment.com

**Happy New Year**


From the team at  
Provincial Development Group  
[provincialdevelopment.com](http://provincialdevelopment.com)



PROVINCIAL DEVELOPMENT GROUP  
optimizing opportunity



**Blain Wease** · 1st  
President @ Provincial Development Group, LLC  
Nashville Metropolitan Area · [Contact info](#)  
500+ connections




PROVINCIAL DEVELOPMENT GROUP  
optimizing opportunity

optimizing opportunity at wealth management firms

provincialdevelopment.com

- Leadership
- Strategy & Execution
- Team & Culture
- Client Services & Experience
- Growth & Brand



Provincial Development Group, LLC



David Hockney  
Appreciation Piece







Illustration  
Personal Project