



BUILDING OPPORTUNITIES GUIDING GENERATIONAL SUCCESS



CELEBRATING ONE YEAR AS AN INDEPENDENT
WEALTH MANAGEMENT FIRM

BOGGS & COMPANY WEALTH MANAGEMENT TURNS ONE!

It is hard to believe that it has been a year since we launched Boggs & Company Wealth Management! It has been a wild year, even difficult and chaotic at times, but through it all, we have consistently been overwhelmed by the support of our clients. During this journey, we became acutely aware of how important the team is to our clients and how they depend on us to take care of them, which is a humbling and good feeling.

We take a lot of pride and responsibility with each and every one of you. So to all of you who came on this journey-thank you.

OUR YEAR IN REVIEW

While getting Boggs & Company Wealth Management off the ground did take up a lot of our time, we were still able to find time for some other activities.

In one year as a team of 13, we collectively:

- Opened over 5,000 accounts
- Moved over \$1 billion in assets
- Served around 1,500 households
- Drank 11,862 cups of coffee
- Took 32,451,055 steps
- Sent 189,800 emails
- Spent 14,235 hours on the phone
- Listened to 30,842 hours of music and podcasts
- Spent 175,565 minutes with family



ADDITIONAL CELEBRATIONS



June 4th: Molly Beeman Celebrates 10 Years in the Industry

We want to celebrate our very own, Molly Beeman for reaching such an important milestone! She not only feels like family to the entire Boggs team but is also Patsy's niece.

Since joining our team, she has become a critical piece of Boggs & Company- coordinating our support staff and overseeing our entire managed money operation. We've seen her go from being reserved fresh from graduating from her MBA program at Frostburg to an outspoken leader on our team. She is a true asset to Boggs & Company and we are so lucky to have her on the team!



June 8th: Brian Kelly Celebrates 30 Years in the Industry

In June, we also have the 30th industry anniversary of our First Vice President, Investment Officer, Brian Kelly!

Brian and Larry have been working together for 30 years and have been together through seven different firms, five market crashes, five market corrections, and a couple of the greatest bull markets. Brian is a pillar at Boggs & Company and does what is absolutely best for his clients every single day. The Boggs & Company team wants to congratulate you on such a professional milestone! Thank you for everything you do for our team.

THE UNIVERSITY OF MARYLAND WINS ENDOWMENT OF THE YEAR AWARD

On April 27th, 2022 the University of Maryland was recognized at the Institutional Investor's 19th annual Hedge Fund Industry Awards, winning the Endowment of the Year category. The Hedge Fund Industry Awards acknowledges investment offices that are innovating for and advancing their institutions.

This is an incredibly important award for the Boggs & Company family as Larry Boggs, Founder and President, is the Chairman of the Investment Committee for the Endowment Fund and the Operating Fund for the University System of Maryland Foundation Board.



**BOGGS
& COMPANY**
WEALTH MANAGEMENT

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