



HENDERSON HUTTER GROUP

QUARTERLY NEWSLETTER

A NOTE FROM LEE

Spring is in full swing down here on the Gulf Coast with everything from the lilies to the jasmine in bloom; this time of year, it's obvious to think about growth. Growth comes in many different forms and our team talks about it often. It's very important to me that we're deliberate in why we grow and how we grow, so we can plan accordingly. At HHG, we're committed to growing our clients' wealth over time responsibly and helping them achieve their financial goals. But we also believe that personal growth and development are just as crucial to overall success and happiness. That's why we encourage our clients to pursue their passions, invest in themselves, and continually strive for self-improvement. On a professional level, we are constantly expanding our team's knowledge and expertise to ensure we're providing clients with the best possible service. Team members continue to grow professionally by learning new skills, honing existing ones, earning credentials, and expanding our capabilities. In this line, we continue to invest in new technologies and resources to always be improving and staying ahead of the curve. It is also true on the personal side with team members learning new languages, training for races, and expanding their horticultural expertise just to name a few – whatever your interests may be, we're here to support you!



tips & tricks

ON CYBER SECURITY

KEEP YOUR EQUIPMENT UP TO DATE. Install the latest updates for your computers and mobile devices. Use security software including antivirus, firewalls and encryption. Before selling or disposing of computers and mobile devices, wipe them of data.

USE WIRELESS NETWORKS WITH CAUTION. Avoid visiting sensitive websites when away from home.

CREATE COMPLEX AND UNIQUE PASSWORDS. These contain a combination of upper and lowercase letters, numbers and special characters. *When possible, elect for dual-factor authentication.* Do not share your passwords.

Continued on next page

Forbes BEST-IN-STATE WEALTH ADVISORS 2023

SHOOK® RESEARCH
© 2023 FORBES LLC - USED WITH PERMISSION

Forbes published their Best-In-State Wealth Advisors last month and the team congratulates **Lee Henderson** for being named as one of the best among his peers for the third year in a row! You can read more about the methodology [here](#).

The Forbes Top Wealth Advisors Best-In-State 2023 ranking, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone and in-person due diligence interviews, and quantitative data. This ranking is based upon the period from 6/30/2021 to 6/30/2022 and was released on 4/4/2023. Those advisors that are considered have a minimum of seven years of experience, and the algorithm weights factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their practices and approach to working with clients. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Out of approximately 39,007 nominations, 7,321 advisors received the award. This ranking is not indicative of an advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. Neither Raymond James nor any of its Financial Advisors or RIA firms pay a fee in exchange for this award/rating. Raymond James is not affiliated with Forbes or Shook Research, LLC. Please visit <https://www.forbes.com/lists/best-in-state-wealth-advisors/?sh=181ba856ab97> for more info.

COMMUNITY ENGAGEMENT

Last month, the team got their hands dirty with SOUL (Sustaining Our Urban Landscape), an organization devoted to improving natural systems and infrastructure in New Orleans through planting trees. Together, we planted almost a dozen magnolia and oak trees in the lower ninth ward neighborhood.



Left: We learned Lee can swing a pick-axe like no one's business! Maybe it was the Chevron hat giving him super strength?

Middle: Brooke, Christine and Erin are all smiles as they get started digging a new hole.

Right: We ended the day with pizza and rum cake to celebrate Megan's birthday – an HHG tradition!



HENDERSON HUTTER GROUP
WEALTH PLANNING ADVISORS

650 Poydras Street, Suite 2315 | New Orleans, Louisiana 70130
info@hendersonhuttergroup.com | 504.375.2120 | www.hendersonhuttergroup.com



Patrick Kungl, CFA
Portfolio Strategist

KUNGL

IN THE INVESTMENT JUNGLE

The second quarter got off to a busy start as we've dealt with regional bank failures, debt ceiling dramatics, and earnings reports. At the moment, we continue to believe that regional bank failures are relatively contained and the banks most susceptible to further issues are the ones flying too close to the sun. Larger financial institutions are still healthy so we do not foresee reason for widespread panic. The debt ceiling is approaching without much progress – something we're keeping a close eye on as the situation develops. Should markets react negatively to "noise", we may look for attractive buying opportunities on a case-by-case basis. Lastly, earnings reports have come in better than expected. As the economy decelerates, we've seen corporate revenues fall. However, companies are in cost-reduction mode, leading to better-than-expected earnings which could serve as a floor for equity markets.

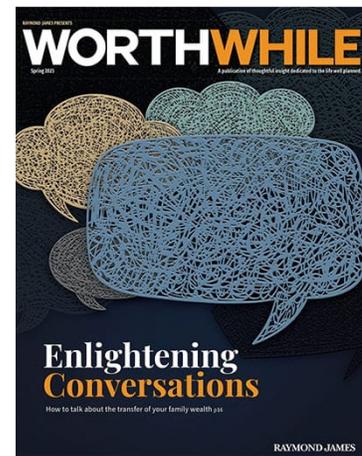
Cyber Security Tips + Tricks (continued from page 1)

- REGULARLY REVIEW YOUR STATEMENTS.** Look for signs of unauthorized activity and promptly report suspicious transactions. Many clients prefer to receive their statements electronically through Client Access at RaymondJames.com. This protects you from mailbox "bandits."
- STAY ALERT FOR ONLINE RISKS.** Never open attachments or click on links in suspicious emails or from senders you don't recognize. Limit the personal information you share on social media.
- BE AWARE OF PHISHING TEXT MESSAGES.** Scammers are using text messages to entice you to provide your personal information, often by posing as online retailers. Do not click links sent to you or provide your information via text.
- PRACTICE SENSIBLE DATA MANAGEMENT.** Shred sensitive documents before disposing of them.

[Click here to read more about how Raymond James protects your privacy.](#)

Looking for more to read?

Click the image below to check out Raymond James' WorthWhile magazine, which is published quarterly and can be accessed through the "Learn" tab of our team website.



TEAM Spotlight

We have **LOVED** being able to see so many of you face-to-face recently now that we have the ability and capacity to travel and safely visit with you!



Left: Brooke and Christine celebrated Mardi Gras this year by riding with the Krewe of Muses, which is known for throwing their beloved, custom-glittered shoes.



Above: Lee, Erin and Megan traveled to Orlando in April to participate in Raymond James' national conference, Elevate. They enjoyed the opportunities to learn from industry leaders and gain insights we can implement into our practice. Lee was among only a handful of top advisors asked to present on their best practices. He did a fantastic job, and we are so proud to be recognized as a leader among our peers.



HENDERSON HUTTER GROUP
WEALTH PLANNING ADVISORS

Henderson Hutter Group | 650 Poydras Street, Suite 2315 | New Orleans, Louisiana 70130 | 504-375-2120 | www.hendersonhuttergroup.com

Securities offered through Raymond James Financial Services, Inc., member FINRA/SIPC. Investment advisory services are offered through Raymond James Financial Services Advisors, Inc. Henderson Hutter Group is not a registered broker/dealer and is independent of Raymond James Financial Services.