

# LOUISIANA COMPLEX NEWS

BATON ROUGE | HOUMA  
LAFAYETTE | MANDEVILLE  
MONROE | NEW ORLEANS | SHREVEPORT



## A WORD FROM JUDE HUVAL



I hope this letter finds you and your loved ones safe and healthy during this most interesting of times. I absolutely appreciate each and every one of you for your flexibility, focus and professionalism in a difficult environment.

In this edition of our newsletter, we wanted to ensure that we are doing our best to look ahead as we slowly see our world around us settle in to the “new normal.” We have included updates from the private client group, practice management resources, and news, notes and accomplishments within our RJ – Louisiana family. I am constantly reminded by many of the sage

and wise words of wisdom; “this too shall pass.” Indeed, it will and we are excited about moving on to our next chapter together in helping to provide comprehensive wealth management to our clients.

I think that we can all agree that our partners in technology have been nothing short of incredible during this immediate shift to remote access. The firm has worked to ensure that all advisors and associates are properly equipped to work from home in order to do our part in slowing the spread of COVID-19. You will also find on page 2 additional information about the firm’s technology solutions for both our advisors and their clients. These tools were developed with valuable insight and constructive input from participating financial advisors in allowing us to provide the best solutions for helping your practice. You can take a virtual tour of these platforms via the link on that page and I encourage you all to check it out with your partners.

As always, please do not hesitate to reach out to me, Jenny, Holly or Mary Ellison if we can help in any way. We will come out of this and we will do it together!

Thank you for all that you do and many thoughts and prayers to you and your families.

**FOLLOW  
THE  
LOUISIANA  
COMPLEX  
ON SOCIAL  
MEDIA!**



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**RAYMOND JAMES** | LOUISIANA COMPLEX

[www.raymondjames.com/louisianacomplex](http://www.raymondjames.com/louisianacomplex)

# RJ TECHNOLOGY TOUR

NEED TO KNOW

## Connected Advisor

### Your practice at your fingertips

Raymond James offers integrated technology built from the perspective of our advisors to optimize efficiency in your practice each and every day. Our commitment is to provide the best technology and tools to support you and your business. With everything we do our focus is on our advisors.



[Click Here To Explore Advisor Technology!](#)

## Connected Client

### Cutting-edge access

We are committed to providing collaboration tools to support the advisor-client relationship. Clients of Raymond James receive unparalleled service and connectivity from advisors who are equipped with the best and most integrated technology in the industry.

[Click Here to Explore Client Technology!](#)

RJ technology is a step above the rest. Having laptops and docking wherever, whenever is so convenient.

-Stephen Green (FA, Mandeville)

## Wellness Tips

Take a look at these tips provided by Shannon McCabe, RN who is a nurse working on the front lines of the COVID-19 crisis in Chicago, IL.

- 1. Get outside and enjoy fresh air.** Spending time outside with Mother Nature and anyone you might be sheltering-in-place with. This is a great way to get some fresh air and Vitamin D from sunshine which is proven to help increase mental health. Just remember to be vigilant and practice hand hygiene and social distancing to help prevent the spread of the virus.
- 2. Limit media intake from both news outlets and social media.** There is an overwhelming amount of information out there regarding the pandemic and it is constantly changing. It is important to be informed so be sure that your informational outlets are providing factual, non-biased information.
- 3. Maintain your pre-quarantine routine.** Even though you may be working or attending class from home, try to maintain the same routine you had before this all started. This includes eating balanced meals, getting adequate sleep at night and staying active through exercise.
- 4. Learn that new skill or language, or take up that hobby you have always wanted to do but never felt you had the time.** There is nothing wrong with binging every show on Netflix, but think how accomplished you will feel when you learn a new skill whether that's taking up cooking, knitting or teaching yourself a new language. There is no better time than now!
- 5. Connect with friends and family.** We live in a time where digital media is the main lifeline for many so utilize it!
- 6. Declutter your life.** This might be in the form of cleaning out your closet to sell/donate items you no longer wear or use or it could be unsubscribing to email lists that seem to fill up your inbox daily that you never open in the first place.
- 7. Take time for yourself.** Remember to take time for yourself whether that means meditating, taking a bubble bath or doing whatever it is that relaxes you. Everyone will thank you for it, including yourself!



Each year for the past 10+ years, Jenny Bernard (Complex Administrative Manager-Louisiana Complex, Branch Operations Manager-Baton Rouge) and her husband have participated in the Crescent City Classic 10k. This year they participated in the virtual race on 4/11/20 and donated to the Baton Rouge Food Bank and Second Harvest in New Orleans to help continue the CCC10K's mission mission. The race raises millions of dollars each year for charity.

## WELCOME TO THE COMPLEX!

Andrew Holman - Branch Manager, New Orleans

Amy Conque - Branch Operations Specialist, Lafayette

Jimmy Farris - Financial Advisor Trainee, Mandeville



Jessie Morgan (Client Service Associate - Baton Rouge) gave blood since there is a critical shortage due to COVID - 9. She has the type of blood type that can be donated to many other blood types.



Kristin Dantin's (Senior Registered Sales Associate in our Mandeville Branch) husband, Derek Dantin, returned home on January 8, 2020 after a year overseas deployment to the Middle East. This was his third deployment since 9/11 - we are so thankful for his service to our country and safe homecoming!



Our new Mandeville branch is complete! A much needed improvement in a growing market to consolidate our branches.

## ANNIVERSARIES

### FEBRUARY

Charles Guercio- 35 years  
Eric Leblanc- 15 years  
Joyce Chustz- 24 years  
Sandra Maranto- 27 years  
Charles Clawson- 22 years

### MARCH

John White- 5 years  
Wiley Gardner- 5 years  
Lois St Pierre- 5 years  
Omar El-Aazami- 5 years  
Donna Robino- 29 years  
Dorinda Mothershed- 20 yrs.

### APRIL

Paula Gaudet- 17 years



**CONGRATS** Ainsley Terrebonne (Client Service Associate - Mandeville) on baby boy Julien Elliott Terrebonne  
October 22, 2019  
7 lbs. 14 oz. 19.5 in



**CONGRATS** Kassi Harrington (Branch Operations Manager - Houma) on baby boy Levi Allan Harrington  
February 14, 2020  
9 lbs. 21 in.

## FEBRUARY

2/3 Will Andrews  
2/7 Leo Barros  
2/7 Valarie Molbert  
2/13 Tommy O'Connor  
2/13 Alan Moore  
2/14 Chris McLaughlin  
2/14 Devon Sharrah  
2/15 Doug Farge  
2/19 Jeffery Lyond  
2/21 Holly Mayatte  
2/22 Daniel Chassee  
2/23 Gary Smith  
2/24 Paula Gaudet  
2/26 Bob Gardner  
2/26 Renee Pastor  
2/26 Andree Schneider



## MARCH

3/1 Steve Duncan	3/16 Michael Sotile
3/3 Ainsley Terrebonne	3/17 John Clausen
3/5 Charles Clawson	3/21 Claire Freidrichs
3/7 Joey Nguyen	3/21 Alyssa Klein
3/8 Omar El-Aazami	3/23 Preston Perez
3/10 Dorinda Mothershed	3/27 Blair Bogan
3/11 Alyssa Vidrine	3/31 Donna Bond
3/13 Kyle Hawthorne	3/31 Stephen Duncan
3/15 Suzanne Bush	3/31 Tara Hammack

## APRIL

4/6 Scott Hollier  
4/6 Tandy Lewis  
4/12 Jennifer Taylor  
4/18 Marc Sanchez  
4/20 Dayla Sparks  
4/21 David Broussard  
4/21 Julie Alexander  
4/24 Brooke Braud  
4/28 Angela Adams  
4/28 Donna Robino



## [Tax Deadline Changed to July 15](#)

## [Monthly Economic Outlook: The Pandemic So Far..](#)

## [Student Loan Payments Suspended for Six Months](#)

## [CARES Act: Retirement Plans, Distributions and Contributions](#)

## [Tips to Protect Yourself From COVID-19 Scammers](#)

You can find these articles and more on Raymond James' news page: [Commentary and Insights](#). These articles are compliance approved to share with clients!

### **RAYMOND JAMES TO DONATE \$1.5 MILLION TO AID THOSE IMPACTED BY COVID-19**

A national donation will be made to Feeding America to help serve individuals facing hunger across America. Local donations will be made in markets where the firm has significant regional presence including St. Petersburg, FL (St. Petersburg Free Clinic and Metropolitan Ministries), Memphis, TN (Church Health), Southfield, MI (Gleaners Community Food Bank), Denver, CO (Food Bank of the Rockies), and New York, NY (Citymeals on Wheels).

Read more [HERE!](#)

### **CEO TURNED PIZZAIOLO!**



This is a great example of the heart at Raymond James. Tash Elwyn, President and CEO of Raymond James & Associates, spent his Saturday lifting spirits and raising funds for St. Petersburg Free Clinic. Check out the article below to see how he turned his backyard into a makeshift pizzeria!

**[Buon Appetito: Why A Wealth Management Executive Became a Backyard Restaurateur](#)**

### **TIP: FIND BENEFICIARIES OF IRA'S**

Question: The new SECURE act is eliminating stretch IRAs. Is there any way to look up the beneficiaries of all IRAs and identify which ones have grandchildren as beneficiaries? Or simply just the age of the beneficiaries that are non-spouses?

Tip: There is a report in Reports Center that will help! It's under "About My Clients" and it's called "Account Beneficiary Information". It will not show if the bene's are grandchildren per se, only if they are spouse, non-spouse, or entity but it does show their age!



### **Renee Pastor Named to Forbes America's Top Women Advisors**

Pastor, an advisor in our New Orleans office, was named to the 2020 edition of the Forbes list of America's Top Women Advisors. The list recognizes top financial advisors across the U.S. This year's Top Women Wealth Advisors list spotlights advisors across the country who were nominated by their firms – and then researched, interviewed and assigned a ranking within their respective states. Congratulations, Renee!

To view the full list click [HERE](#)

The Forbes ranking of America's Top 1,000 Women Wealth Advisors, developed by SHOOK Research, is based on an algorithm of qualitative and quantitative data, rating thousands of wealth advisors with a minimum of 7 years of experience and weighing factors like revenue trends, AUM, compliance records, industry experience and best practices learned through telephone and in-person interviews. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Research Summary (as of April 2019): 32,000 nominations were received based on thresholds (9,654 women) and 1,000 won. This ranking is not indicative of advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. Neither Forbes nor SHOOK receive a fee in exchange for rankings. Raymond James is not affiliated with Forbes or Shook Research, LLC. Please visit <https://www.forbes.com/top-women-advisors/#28abc5bd51f4> for more info.

# Umbrella Walk & Gumbo Gras



*Pictured above in the center is Drew Necaie (AMP - Financial Advisor in our Mandeville branch) who won runner up in the gumbo competition.*

On January 25th, 2020 the Tucks Charitable Foundation hosted their 3rd annual Umbrella Walk & Gumbo Gras in Audubon Park. 100% of proceeds from the event benefitted special needs children and adults with ALS in the New Orleans community. One of the beneficiaries was Krewe De Camp, which was founded and is run by Stephen Green and Preston Perez, both FAs in our Mandeville branch.



[www.friendshelpingkids.org](http://www.friendshelpingkids.org)

## A CHILD'S WISH OF GREATER NEW ORLEANS

A Child's Wish of Greater New Orleans is a Louisiana based non-profit organization that grants the wishes of critically ill children. Lenny Alsfield (an advisor in our New Orleans branch) is a founder and director. A Child's Wish sent Londyn and Hartley to Disneyworld for their wish. The girls were born with a number of skeletal disorders including craniocervical junction, basilar invagination, complex chiari malformation, and a syrinx on the spine.

Lenny, Londyn and Hartley were featured on the local news in February to promote a fundraiser benefitting the organization. To watch the interview click [HERE](#).



*Lenny Alsfield with Londyn and Hartley*



To learn more about A Child's Wish of Greater New Orleans, visit their website at <https://achildswish.org/>



*Lenny with Londyn, Hartley and their mother, Erica Smith, being interviewed on WVUE*



# Jason Tiser

## Financial Advisor, Husband, Girl Dad

### How did you decide to become a financial advisor?

After graduating from Louisiana Tech, I truly had no idea what I wanted to do for the rest of my life. I had a meeting with the local President of Bank One who was a family friend. He offered me a job as a Personal Banker. After I accepted his offer, I admitted that I had no idea what I wanted to do with the rest of my life! He calmed my fears by saying that the world has changed, the days of going to work for a company, getting your gold watch in retirement and going to the house are gone! I fell into the Financial Advisor role from that Personal Banker position at Bank One.

### What's your secret to balancing home and work life?

One of the biggest "perks" of this business is having a flexible schedule! Having four daughters, ages 6 and 9, we are very busy to say the least! Our girls are involved in school and city league softball, ballet, tap and jazz dance, tumble and cheer, voice, violin and piano and let's not forget school. It is not an easy schedule, but with the help of two amazing college girls, we are able to make it work. There is no secret to the balance, you have to work hard in order to have a home life! I remember Jude telling me in my first meeting with him: "We work hard so that we can play hard!" One of our secrets is "Date Night." My wife, Gretchen, and I make sure that we have dinner out without the girls at least once every two weeks and we try to have a standing lunch date on Fridays.

### How are you servicing clients differently during COVID-19?

I am a hands on advisor, I do not like to talk on the phone. I prefer in person meetings. It has been a challenge. I have an older clientele who for the most part is not tech-savvy, making Zoom meetings a complication. I have taken advantage of emailing proposals and hypotheticals. I've realized the importance of non-verbal communication.

### How has your routine changed during COVID-19?

The new routine has been the most difficult adjustment. For me, I am trying to maintain my normal routine, but it has been a struggle for the girls. Distance Learning has been more than a struggle for this family of six with "Essential Employee" parents. Gretchen manages Loan Processes for a local bank, so she has been overwhelmed for weeks now. We have both been stressed to say the least while trying to maintain some normalcy for our girls. The 9 year olds have been easy. They log onto the school site every morning and work until their tasks are complete. The littles are a different story! OMG, I almost forgot....they eat so much! Who knew? Every 15 minutes, somebody is hungry! I have now implemented a knock order for my home office. They must knock and wait for me to answer, no screaming and crying unless there is blood involved!

### What are you passionate about and how does that translate into your work?

I am truly passionate about people! You cannot perform this job well if you do not like people. And to think that I have helped some achieve a financial goal is just icing on the cake!

### What's your favorite way to spend a Sunday?

My favorite Sunday routine would be 11:00 AM mass with the family and then a leisurely afternoon outside with Gretchen and the girls which typically involves grilling and an afternoon cocktail!

### What is the best part of being a Girl Dad?

This is a difficult question! Even though we have two sets of twins, we have four distinctively different daughters! They all have very different personalities. Thank God they love their daddy and they think that I am great at everything! I say this jokingly, because I am not! For instance, I played junior high basketball, I might have been better with some practice, but as a result of my basketball career, they think that I should coach their school team! Our 6 year olds recently completed a questionnaire about their dad. One of the questions was: "My dad's pockets are full of:" they independently answered, our Barbie stuff and ponytail holders! These four are my biggest cheerleaders for now!



Jason and Gretchen with daughters Lucy, Julia, Mary Thomas & Margaret Lee

# IMPORTANT DATES

May 25: Memorial Day

July 4: Independence Day

September 7: Labor Day

MAY							JUNE						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
26	27	28	29	30	1	2	31	1	2	3	4	5	6
3	4	5	6	7	8	9	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28	29	30	1	2	3	4

  

JULY							AUGUST						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
28	29	30	1	2	3	4	26	27	28	29	30	31	1
5	6	7	8	9	10	11	2	3	4	5	6	7	8
12	13	14	15	16	17	18	9	10	11	12	13	14	15
19	20	21	22	23	24	25	16	17	18	19	20	21	22
26	27	28	29	30	31	1	23	24	25	26	27	28	29
2	3	4	5	6	7	8	30	31	1	2	3	4	5

Payroll Cut Off & Commission Cut Off

☐ Payroll Cut Off & Commission Cut Off for 3 week time period

Reminder: All time worked and paid time off should be entered on daily basis

HR Cut Off

Pay Day

RJ Holidays

HAVE AN IDEA?

WE ARE LISTENING! PLEASE CONTACT US WITH ANY IDEAS FOR CHARITY DRIVES, FUN EVENTS OR ITEMS FOR THE NEWSLETTER!

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