

Louisiana Complex NEWS

BATON ROUGE
HOUMA
LAFAYETTE
MANDEVILLE
MONROE
NEW ORLEANS
SHREVEPORT



A WORD FROM JUDE HUVAL



Complex Manager

Happy New Year!! I hope that each of you had a wonderful Christmas and holiday season.

While we wrap up another year and move in to a new decade, we prepare for what promises to be an interesting 2020. The Louisiana Complex had another great year leading to expansions in Baton Rouge and New Orleans along with a brand new office consolidating our two Mandeville locations.

With that growth, many advisors achieved new milestones and club levels.

From a practice management perspective, 2020 introduces Prudent Process as a detailed component of our day-to-day activities in providing a specific documentation vehicle for offering fiduciary advice to our clients. Holly concentrated the bulk of her practice management meetings during the 4th quarter of 2019 to help ensure that we all have access to policy information, process implementation and efficiency best practices.

Congratulations on a great 2019, I wish you all a successful 2020. As always, please let us know if we can help in any way.

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LOUISIANA
COMPLEX ON OUR**

**NEW AND
UPDATED**

**SOCIAL MEDIA
AND E-MAIL**



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RAYMOND JAMES | LOUISIANA COMPLEX

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CELEBRATING THE HOLIDAY SEASON



COMPLEX HAPPENINGS



ANNIVERSARIES

September

Jude Huval- 16 years
Richard Preis- 25 years
Rosa Stelly- 25 years
Jeffrey Lyons- 10 years

October

Wanda Rice- 5 years
Donna Bond- 5 years
Tanya Baldwin- 15 years
Frankie Domino- 24 yrs
Daniel Chassee- 24 years
Rusty Renaudin- 19 yrs

Joey Nguyen- 19 years;
Paul Morgan- 17 years
Angela Adams- 5 years
Mike Mann- 5 years
Patrice Naquin- 17 years
Jessie Morgan- 5 years

November

Tommy Hyde- 27 years
Henry Mayer- 23 years
Jason Fontane- 21 years
Blake Bergeron- 5 years
Marc Sanchez- 27 years

Norman Duhon- 17 years

December

Jennifer Taylor- 35 years

January

Mary Brown- 41 years
David Broussard- 22 yrs
Bryan Bordonel- 21 yrs
Leon Hammack- 32 yrs
Tandy Lewis- 33 years
Devon Sharrah- 18 yrs
William Whitman 16 yrs
Kenneth Allen- 15 years



ACCOMPLISHMENTS

Donna Bond (Shreveport) passed her Series 7 in December.

SEPTEMBER BIRTHDAYS

9/4 Kevin Philips
9/11 Tommy Hyde
9/11 Pete Steffens
9/11 Todd Francis
9/13 Lisa Westmoreland
9/14 Colin Seibert
9/15 Joyce Chustz
9/18 Derek Daniels
9/22 William Miller
9/30 Kristin Dantin
9/30 Joe Byrd

OCTOBER BIRTHDAYS

10/1 Roger Sullivan
10/2 Jason Tiser
10/3 Sue Moise
10/4 Stephen Green
10/15 Patrice Naquin
10/17 Rebecca Laiche
10/24 Jana Bice
10/29 Mary Laenger
10/30 Yolanda Wessel
10/31 Andy Lovell
10/31 Frankie Domino

NOVEMBER BIRTHDAYS

11/2 Jude Huval
11/3 Tanya Baldwin
11/4 Keith Steele
11/6 Claudia Billeaud
11/10 Carol Cavilliere
11/12 Wendy St.Romain
11/13 Susan Gaudin
11/15 Sandra Maranto
11/16 Perry Brown
11/19 Meg Kaul
11/23 Lois St.Pierre
11/26 Richard Preis

DECEMBER BIRTHDAYS

12/1 Christina Lajaunie
12/4 Shirley Cook
12/9 Bowen McRae
12/10 Robert Douglas
12/11 Matt Colvin
12/15 Julie Wray
12/18 Leon Hammack
12/19 Justin Ranger
12/22 Paul Morgan
12/23 Louis Gary
12/24 Dana Mitchell

JANUARY BIRTHDAYS

1/6 Mary Brown
1/7 Chelsy Pellegrin
1/8 Jim Farris
1/12 Gil Johnson
1/15 Marshall Roy
1/18 Jason Fontane
1/20 Kenneth Allen
1/21 Sharon McLean
1/28 John White
1/31 Jannie Markey

★ Commentary and Insights from RJ ★

[Markets and Investing: S&P 500 Rings in the Decade With Best Performance Since 2013](#)

[Lifestyle and Technology: Simple Tips for Securing Your Computer](#)

[Estate and Giving: Proud Alumna or Alumnus? Explore Strategies for Giving Back](#)

[Retirement and Longevity: Start the New Year With an Organized Outlook](#)

[Family and Life Events: How Do College Savings Affect Aid Eligibility?](#)

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

BRANCH LEADERSHIP CLUB

- | | | |
|-------------------|---------------------|---------------------|
| • Tony Barrett | • Chris Leavy | • John Pace |
| • Carl Buckner | • Rodney Lineberry | • Kelly Rindock |
| • Nathan Clakley | • Jeff Mallula | • Ed Sudzina |
| • Don Davis | • Cooper Mickle | • Michael Turnbough |
| • Clifford Foster | • Diane Morgan | • Lewis Walterhouse |
| • Steve Fricke | • Field Norris | • Dan Wisniewski |
| • Jude Huval | • Patrick O'Donovan | |

Our complex manager, Jude Huval, was recently recognized as a member of the inaugural RJA Branch Leadership Club for FY2019. Branch and Complex Managers were selected by their divisional directors based on their overall success in supporting advisors, branch associates and leading and growing the business. Congratulations Jude!

NEW OFFICE CONSTRUCTION UPDATES



The new Mandeville office is in the home stretch!



Walls are up in the New Orleans office!

COMMUNITY INVOLVEMENT

THANK YOU FOR BEING A PART OF OUR EFFORT TO BE MORE INVOLVED IN OUR COMMUNITIES!



November 2019

GREATER BATON ROUGE
FOOD BANK

MEMBER OF
FEEDING AMERICA

In the spirit of giving thanks, our Baton Rouge and New Orleans branches volunteered at food banks in their respective cities on November 20th, 2019. Volunteers from our Baton Rouge branch sorted donations at the Greater Baton Rouge Food Bank. In New Orleans, our group packed meals and prepared food in the Second Harvest Food Bank Community Kitchen. It was a great day for all involved!



August 2019



SECOND
HARVEST
FOOD BANK
ORANGE COUNTY

On August 15th, 2019, associates from our New Orleans and Mandeville branches helped to sort and pack food at Second Harvest Food Bank.



LAFAYETTE SCHOOL SUPPLY DRIVE

In August, our Lafayette branch donated school supplies and uniforms to students in need at Corporal Michael Middlebrook Elementary School. Thank you all for giving back to your community!



ROGER SULLIVAN

Triumph Over Tragedy

Many financial advisors can attest that their initial career plans did not include them joining this profession. However, few can say their path to getting here is as unique as Roger Sullivan's. His journey to where he is today has included four occupations across two states and a heartbreaking tragedy that changed the arc of his life forever.

Roger began his career as a hospital pharmacist, then became a minister, while in that profession, took a doctorate in theology, and later was an adjunct college professor. Then in February of 1998, his wife, Shirley, and daughter, Joy, were in a tragic car accident. Joy was killed, and Shirley was permanently paralyzed from the chest down.

Joy seemed to have made an impact on everyone who crossed her path. Her life was a personification of her name as she inspired joy in every facet of her life. This was evident in the countless experiences people shared with the family after her death. Her funeral was the highest attended service in the history of Vernon Parish, with friends and acquaintances coming from all over the country.



One of Roger's favorite stories about Joy is that of her meeting President Bill Clinton when he visited Fort Polk. She pulled some strings to get herself into his reception at the base, and after going through the receiving line and meeting him briefly, she decided to go through again. Upon meeting him the second time, the president remarked curiously that he thought he had met her earlier. Joy replied, "Yes sir, we met, but the first time I came through, we didn't get a chance to talk." The president said, "Well, let's talk!" They talked for upwards of 15 minutes.

In her short life, Joy traveled all over the country as a national officer with the Future Homemakers of America (now known as the FCCLA). She also traveled to Europe with Roger the summer before her death. Her love of travel inspired Roger and his family to endow the Joy Louise Sullivan Memorial Travel Abroad Scholarship at LSU. The scholarship helps fund expenses for students who apply to study abroad. More information can be found [here](#).



Joy Sullivan

Roger and his family have taken their devastating loss and found many ways to perpetuate Joy's positive impact on the world. In addition to the LSU scholarship, through a foundation set up in her memory, they award two scholarships annually to graduating seniors from her high school, Anacoco High School in Vernon Parish. This act of generosity in honor of Joy has set in motion a ripple effect of positive events for the recipients.

After the accident, Mr. Bob Hazel asked Roger during a routine phone call to consider coming to work with A.G. Edwards & Sons. Initially, Roger blew off the offer, not thinking he was serious. But at the urging of a family friend who knew Bob, Roger went for the interview. The flexibility of office hours were particularly appealing because of the care needed for Shirley. But what resonated even more was that Mr. Hazel stressed the fact that advisors have opportunities to help people every day.

So, Roger accepted the position—not knowing that only about one in thirty new brokers succeeded in the business. Roger was fortunate to have a seasoned broker like Mr. Hazel as an excellent mentor, and eventually they became partners, both building relationships with all of their clients. This solidified the client relationships in such a way that when Mr. Hazel retired the vast majority of his clients stayed. At Mr. Hazel's insistence, Roger also handled his funeral service.

Now Roger runs his practice with his son-in-law, Kyle Hawthorne and Senior Registered Client Service Associate, Meg Martinez, who has worked with Roger for over 14 years. Kyle is married to Roger's middle daughter, Ashley. Roger says that teaching has been a huge part of all of his different roles, and continues to be a big part of the client relationships now. He maybe got that honest through other family members. His mother, wife, and two sisters-in-law were all teachers.

Roger takes great joy in the fact that there has not been a single day in his career as an advisor where he did not help someone. He continues to follow the old motto of A.G. Edwards & Sons that also seems to be our motto at Raymond James: "Put your clients first and yourself second. If you do that, the company will be fine!"



RJ Women's Symposium 2019
Holly Mayatt, Joyce Chustz, Jenny Bernard



Our New Orleans branch had fun celebrating Halloween this year!

Pictured: Renee Pastor, Alyssa Vidrine, Chris Montgomery, Angela Adams, Rosary Waguespack, Paula Gaudet, Ilise Greenstein, Julie Alexander



Boy Scout of America ISTROUMA AREA COUNCIL, hosted the 2019 Business & Industry Leaders" Luncheon in Baton Rouge on 9.17.19. Keynote Speaker was SCOTT WOODWARD, LSU Athletic Director

Pictured (L to R): David Broussard, Philip Guercio, Michael Sotile



Carillon Tower Advisors hosted a tailgate at the LSU/Auburn game on October 26, 2019. Casey Hendrickson and Ryan Tedesco were the reps from Carillon Tower Advisors



FAs Will Nalty and Mike Mann at the August birthdays celebration in the New Orleans branch



In October, Nita Lindsly of Baton Rouge Woman's Hospital visited our Baton Rouge branch to educate the ladies in the office on breast cancer risk, awareness and prevention.

WELCOME TO THE COMPLEX!

Ryan Bowen (Baton Rouge) – AMP

Amy Lamarche (NOLA)



Louisiana Operations Managers attended the 2019 Operation Managers Conference in Tampa, FL on October 23-25



Shreveport associates show their LSU support on National Championship game day. Geaux Tigers!



CONGRATS Leo Barros (NOLA)
on baby boy Lucas, born on August 14, 2019.



CONGRATS Stephen Miller (Baton Rouge)
on baby boy Luke Thomas, born on November 16, 2019.



CONGRATS Meg Kaul (NOLA)
on baby boy William Carter born on November 29, 2019.

IMPORTANT DATES

January 21: Martin Luther King, Jr. Day (OFFICES CLOSED)

February 18: Washington's Birthday (OFFICES CLOSED)



Andre Dugas
Dec. 29, 1976 - Nov. 15, 2019



John Poche
Sept. 21, 1959 - Nov. 4, 2019

IN LOVING MEMORY

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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RAYMOND JAMES

LOUISIANA COMPLEX

**SOCIAL
MEDIA**

Please remember to follow the complex on Facebook [HERE](#) for important information & announcements!

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