

New Perspectives, Inc.

FINANCIAL SOLUTIONS

Nancy Lottridge Anderson, Ph.D., CFA and Ryder Taff, CFA, CIPM Advisors

Volume 103 February, March 2016



Notes from the TD Ameritrade Conference!

By Jackie Wright

Nine years into being your Office Manager, I find there is still so much to learn. After three flight delays, Susan and I headed to our second TD Ameritrade conference. We were excited to trade the rain in Jackson for the sunny skies in Orlando.

We attended breakout sessions on how to best protect the security of your identity and your accounts in this ever-changing world of technology. There were discussions on how to work with a secure paperless environment—Save a tree!—and how to make our back office procedures more efficient.

We heard from a terrific slate of speakers, but there were two that stood out to me. Sally Hogshead, CEO of Fascinate, Inc., investigates what makes people and brands fascinating. While leading us through a personal assessment of our strengths and weaknesses, I discovered how I can best help others by tapping into this knowledge. David Isay, Founder and President of StoryCorps, an

ongoing oral history project, discussed the importance of preserving stories for future generations. I have been a longtime fan and listener of these human interest stories on MPB. Every person has a story to tell and StoryCorps is deliberate in listening.



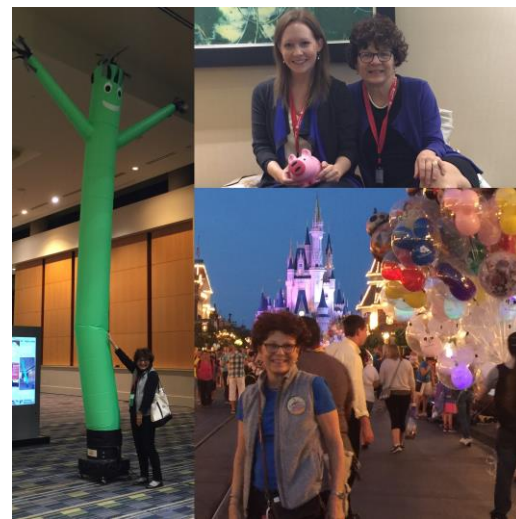
Our office is well aware of how the ways we communicate are changing. Some of you still like to sit with a yellow notepad around the table for a discussion. Others prefer to pull an account up online, see a graph, chart a course and ask questions via email. With us you can have both!

Here's one take-away I brought back from the conference: Every person has a rich and unique story, and we want to hear yours so that we can be your Financial Life Manager. Some days I'm listening to you on the phone. Other days, I might be emailing or texting you information

concerning your account. This is all great!

The other thought I left with was this: "Love what you do and have fun doing it!" I am fortunate to be able to do just that, and I am honored to have the privilege of working for you and hearing your stories.

Everyone told me that while in Orlando, I must see Disney World. So, I went for the first time ever. Susan and I spent about four hours at the Magic Kingdom with fireworks, an electric street parade and a laser light magic castle show. Whew! Been there, done that!



**Nancy Lottridge Anderson,
Ph.D., CFA
Fee-Only Financial Advice
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The Lighter Side

Find something you're passionate about and keep tremendously interested in it. – Julia Child