

Top Producers Path to Gold

FOR MORE INFORMATION:

If you want to learn more about how to implement the strategy discussed, you can contact one of the following from our Program Management Resource Center: Tom Ostrand, Olivia Millrad, Cynthia Pollard.

SEI Economic Outlook Summary Conclusion

The following information is based upon a April 2018 report published by SEI Knowledge Center.

- The Bull Market in US equities appears to be consistent with the latter stages of an up cycle.
- There are cyclical pressures pushing yields up from their historic lows.
- Although equity markets did experience their first real correction in 20 months, they do not feel it is the start of a serious decline.
- The treasury yield curve remains upward sloping and in their opinion can narrow further without causing any problems
- They are in a watchful mode when it comes to trade but believe it is premature to expect a catastrophe.

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Top Producer Corner

Congratulations to Stephanie Gudka for being the first producer to achieve Bronze Status for 2018. Besides showing up and working hard, Stephanie credits her emphasis on Advisory Business as one of the keys to her success. Stephanie emphasizes the role of being a consultant and not just selling products to the clients.

Stephanie also credits her dynamic team working to stay connected to the clients and allows for a hands on approach to provide the service orientated experience with attention to detail.

Advisory clients are contacted 4 times a year. The team holds a market update seminar for their clients to keep them informed and orientated to the market forecast.

Stephanie utilizes the Money Guide Pro tool to assist in developing the financial planning picture for the advisory clients.

The attention to detail service provided by Stephanie and her team lends itself to increasing client referrals. The referrals continue to grow and are yet another reason why Stephanie is on track to once again be a Gold Pacesetter.



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Story continued from front

- Further gains in the U.S. and Global equity prices.
- They maintain a favorable view of equities and other risk assets but admit their optimism is being tested.
- They have pointed out on several occasions in the past, the U.S. equity market has historically withstood the depressive impact of rising interest rates until U. S. bonds reaches a rate of 4% -5%.
- They are pointing out the past nine years have been full of challenges and uncertainties. Their belief is the years ahead don't seem to promise anything different in that regard. The bull market has managed through it all and their belief is to give the bull market the benefit of doubt for a while longer.

The information is not to be relied upon for individual investment but is for educational purposes only. The full article can be obtained from Nancy Ellis.

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