

## ***Lessons I've Learned on the Premier Path***

by Patricia Laramore, CFP, The Amplified Version as annotated by Dave A. Reed

1. **Lead with Love.** – *Servant leadership is a part of our culture. We want people to know that we are here to serve them and to help them. We accomplish that by leading them up the path to retiring and down the path of retirement.*
2. **Help clients understand and embrace the difference between “retiring from something” and “retiring to something”.** – *Retirement should not consist of wasting away on the couch or the porch. We help people set new goals and make plans so that the clients can achieve those goals. Whether it be travel, volunteering, helping with grandkids / parents or starting a new career or hobby, we're here to help facilitate the process of entering the next season of life.*
3. **Invest first in relationships so you can better invest client assets.** – *Retirement planning is a relationship driven process. How can we know how to invest a person's assets without knowing their hopes, dreams, fears, goals and passions?*
4. **Be lovable so that others can be.**
5. **Lead; serve; then get out of the way.** – *Lee Armstrong, a pastor at Victory Life Church is famous for saying, “making it longer won't make it any better.” We try to be succinct and efficient while being thorough.*
6. **People want to know that you care, more than they care what you know.** – *See number 3.*
7. **Most of our clients are someone's parents. Treat them respectfully, like you want your own parents to be treated.** – *The Golden Rule*
8. **Be blessed to be a blessing.** – *This is our driving force, we love to give back to our families, our communities, and our churches. The more God blesses us, the more we can be a blessing to others.*
9. **People love to buy, but they hate to be sold.** – *We desire to be sources of solutions, not products. We don't like to be “sold” either!*
10. **Give it away, and it will often come back multiplied.** – *The Law of Sowing and Reaping is biblical at its core and is tied to the principle of tithing. Proverbs 3:10 If you give out of love; expecting nothing in return, then your barns will be filled to overflowing, and your vats will brim over with new wine.*
11. **Oftentimes; people would rather you hear what they have to say than hear what you have to say.** – *We have two ears and one mouth for a reason.*
12. **Big Chief tablets may not be used much today, but they will never outlive their usefulness.** – *Sometimes, the old way is the best way.*
13. **Kindness and consideration matter.**
14. **Believe in talking unicorns!** 😊 – *Private joke. You'd have to know Patty.*
15. **Pray without ceasing and trust that Jesus is the CEO over it all.**

*Shalom – Patty*

*"With upright heart he shepherd them and guided them with his skillful hands."  
Psalm 78:72*

June 7, 2019

Hello,

*Our initial newsletter includes an update from Premier Investment Advisors and the Quarterly Market Insight from LPL Research. This issue is longer than normal; however, we have a lot to share with you in our first newsletter.*

*In May of 2018 Teresa Adams and Dave Reed entered into an agreement to merge practices with Patricia Laramore. Patty had maintained a presence in Oklahoma for over 30 years. Since Patty retired on April 30, 2019, Dave and Teresa have assumed the role of Financial Advisors for the practice and are here to serve the many friends that Patty made over the years. We look forward to getting to know our clients in Oklahoma/Lubbock and surrounding areas better.*

*To deepen your knowledge and understanding about who we are and what we believe, we have chosen to share something very special with all of you. As Patty was departing, she wrote down some words of wisdom on her Big Chief Tablet, we would like to share them. It has been transcribed into a document that I have annotated so that our clients can gain a deeper insight into the core values of our firm. We hope you will enjoy it.*

*Something new will be happening at Premier Investment Advisors. **A Charity Drawing** will be held each month. If you would like your favorite charity to be considered for a donation send us the name. At the end of each month we will collate the charity requests together and draw one charity out at random. A donation will be made in honor of the client who submitted the charity's name.*

*Our September newsletter will be a Customer Survey. All completed and returned surveys will be entered in a drawing for a \$100 VISA gift card.*

*For future newsletters, you will receive an email instructing you to click on our website to view the newsletter. **If you wish to receive the newsletter by Postal mail, please let us know by calling the office (903) 246-9300 and requesting to be put on the quarterly mailing list.***



*Your Partner on the Path*