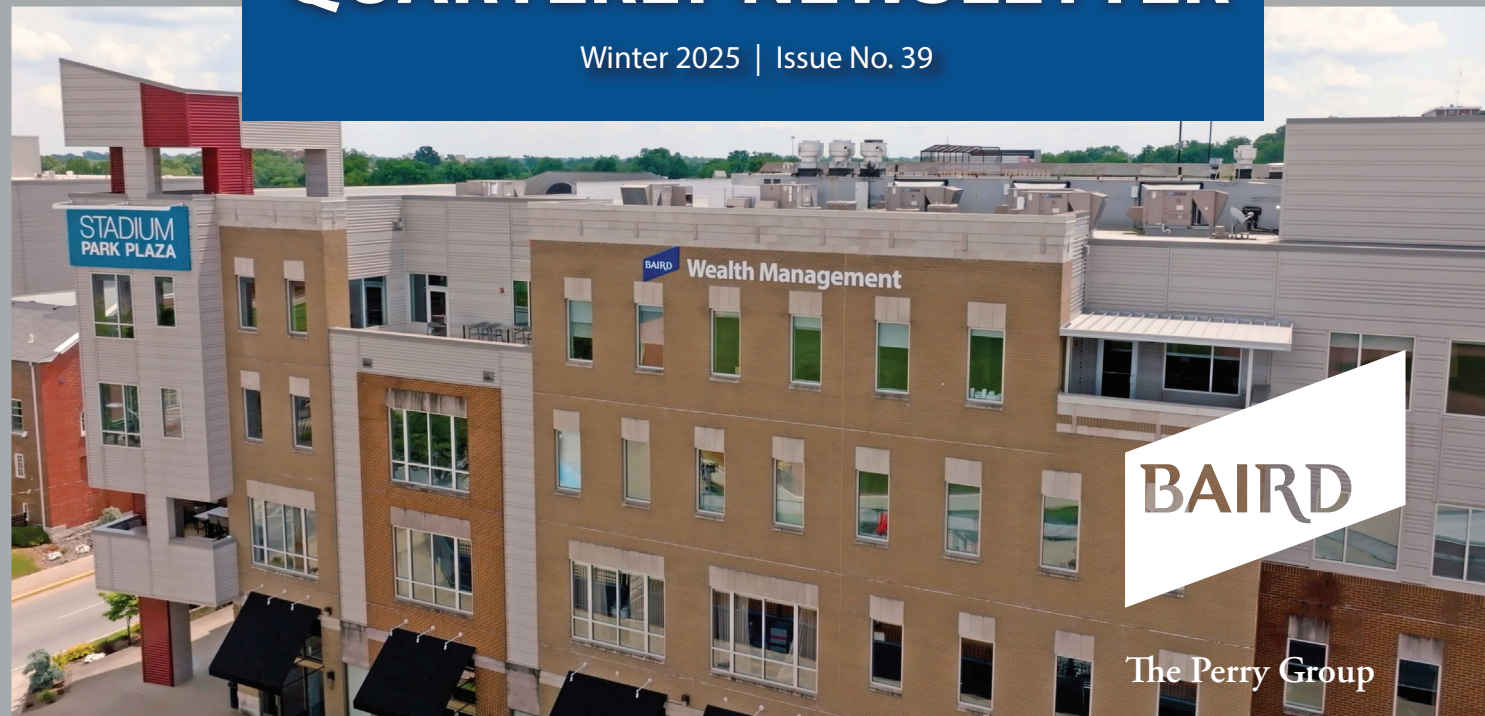




# THE PERRY GROUP QUARTERLY NEWSLETTER

Winter 2025 | Issue No. 39



The Perry Group



## The Perry Group

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## The Perry Group

Front photo pictured left to right: Melissa Steele, Jacqueline Keltner, Jake Gaebler,  
Shawn Perry, Brooke Cassady, and Michelle Humphrey

**Shawn M. Perry, CFP®, CPWA®**  
Financial Advisor  
Branch Manager

**J. Brooke Cassady,**  
**CFP®, AFC®, CPWA®**  
Associate Financial Advisor

**Jake Gaebler, QPFC**  
Associate Financial Advisor

**Jacqueline H. Keltner, CFP®, CPWA®**  
Assistant Vice President  
Branch Administrative Supervisor

**Melissa Steele**  
Senior Client Specialist

**Michelle Humphrey**  
Client Assistant

# Welcome, Jake!



We are thrilled to announce Jake Gaebler has joined The Perry Group! Jake is a proud Hilltopper with a bachelor of science in Financial Management and an MBA from WKU. You may remember Jake from his football years at WKU. After 10 years in sales and marketing, he made the switch to finance in 2021. Jake is deeply involved in our community, serving as a commissioner on the boards of Warren County Pee Wee Baseball and Warren County South Little League.

Jake recently earned his QPFC designation. The Qualified Plan Financial Consultant (QPFC) – developed by some of the nation’s leading advisors and retirement plan experts – demonstrates a knowledge, expertise, and commitment to working with retirement plans.

Jake is married to Ally and they have three sons. Outside of work, Jake enjoys spending time with his family, coaching, golfing, and fishing. Jake is a perfect with our team, and we believe you will agree. We are excited for everyone to meet him in the coming months. Welcome, Jake!

## Save the Dates

On **Wednesday, March 19th**, we will be hosting a luncheon and presentation titled “Estate Planning Lessons from the Stars” at the Knicely Conference Center. More details to come.

Mark your calendars for **Thursday, June 5th**, for our annual client appreciation picnic at Ironwood Farm. Plan to bring your kids and grandkids because we will have lots of fun activities for them to enjoy. More details to come.



## Looking Forward

Over the last few months, our team has been pouring appreciation, encouragement, and compassion into one another. We can do this because our clients, families, and communities have also poured into us. We greet you this new year with grateful hearts and a focused vision of our path forward.

When presented with the opportunity to realign our team, we chose to revisit our mission and vision statement, as well as our core values for The Perry Group. Our vision for this year, and many years to come, is **to create a remarkable wealth management experience**. Our mission statement and core values will be used as guideposts to help us accomplish this vision.

### Mission Statement:

*We care for our clients, teammates, and community with compassion and excellence.*

### Core Values:

*Humility* - We don’t think less of ourselves, we think of ourselves less.

*Wisdom* - We take our jobs very seriously, but not ourselves.

*Hospitality* - An engaging, approachable, hometown feel with a global perspective.

*Care* - Biblical values guide our actions.

I’m humbled to say that I link arms with an outstanding team that exemplifies these values. We strive to meet each opportunity or obstacle with intentional action, keeping a steady vision on the Lord for guidance.

In 2024, we hosted Michael Antonelli, a Baird market strategist, to discuss why he coined 2024 “the year of the big mistake.” Through this discussion, he outlined that the market is apolitical and thinking that it has a preferred political party is where someone would find themselves mistaken. In fact, the market prefers certainty and with the election behind us, we find ourselves optimistic toward the future.

We are happy to announce we are hosting another client luncheon on March 19th titled **Estate Planning – Lessons from the Stars**. We will host Chris Staples from Baird Trust Company to discuss estate planning principles explained through some well-known stars’ planning (or lack thereof!). Accompanying him will be Ross Mayfield, a client favorite from our last luncheon, to give a 2025 Market Outlook. There will be more details to come on this!

We look forward to this year equipped with wisdom from past lessons, care in our hearts, hospitality top of mind, and humility to keep us grounded. Thank you for your continued trust in our team! The following Bible verse is one I am keeping close to my heart as I engage with my family, teammates, clients, and community in 2025:

“Don’t worry about anything; instead, pray about everything. Tell God what you need and thank him for all he has done.” Philippians 4:6 NLT

*- J. Brooke Cassidy*

# Supporting Our Community



## Hope House Ministries Affordable Christmas

We are deeply grateful to all the clients who attended our branch Christmas open house and generously donated gifts, clothing, gift cards, and money to support Hope House Ministries' Affordable Christmas Program. The checks and gift cards alone added up to a total of \$5,610!!! Thank you for helping us support our community and this incredible local initiative. You all are amazing!



## Med Center Health's Women's Conference

We had a great time at the Med Center Health's Women's Conference, a day dedicated to women. It was a fun-filled event with amazing vendors, inspiring speakers, generous sponsors, and a wonderful group of ladies!

## The Center for Courageous Kids' Stars & 6 Strings



It was a truly special night at Stars & 6 Strings. The event was filled with music and inspiration. We came together to honor courage and unity through remarkable performances and touching stories about the campers at CCK. The camp is such a special time for the kids. The evening was nothing short of amazing, leaving us grateful for The Center for Courageous Kids and their invaluable support for the children in our community.

## Women's Fund of South Central Kentucky



Several of the ladies from our team and branch attended the Women's Fund annual meeting and dinner. It was an amazing night and great to hear how this organization is making a difference in our community. A \$100,000 Impact Grant was awarded to House on the Hill. \$51,000 was awarded to The HIVE, and \$10,000 was awarded to Kids on the Block.

## Economic Outlook Luncheon



Thanks to everyone who attended our Capital Market Outlook in October. We had a great turnout and everyone enjoyed the speakers. Be sure to check out our save the date section for our next one. We hope you can join us in March.

## CPR & AED Certified

We are excited to announce that we now have 2 certified Heartsaver® CPR & AED trained team members on our team. Michelle and Jacqueline recently completed the American Heart Association courses and are able to provide CPR and use our AED in a safe and timely manner. While we hope these skills never need to be used, we are grateful for Baird's investment in the safety and well-being of our clients and coworkers.

# Work Anniversaries

Recently, we've celebrated several work anniversaries, with another one just around the corner. In November, Michelle marked 7 years with our team, followed by Jacqueline celebrating 10 years in December. Looking ahead to January, Shawn will commemorate 24 years in the industry, and Melissa will celebrate 21 years with the team, but almost 35 years in the industry.



Michelle, 7 years



Jacqueline, 10 years

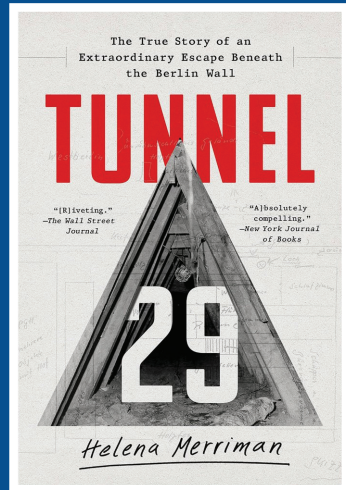


Shawn, 24 years

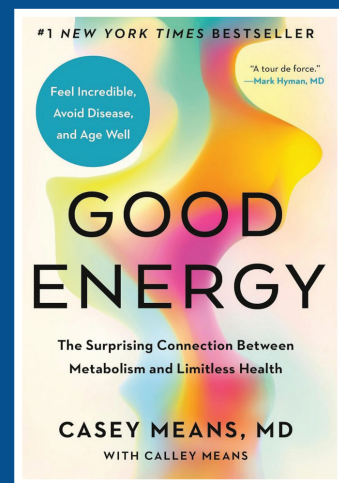


Melissa, 35 years

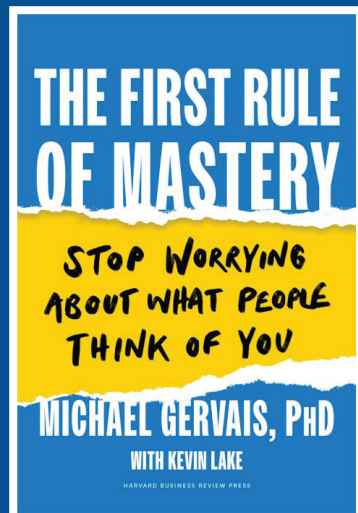
# What Books We Are Reading



Shawn is reading *Tunnel 29* by Helena Merriman. Based on a hit podcast series, this “riveting” (Wall Street Journal) book tells the unbelievable true story of an escape tunnel under the Berlin Wall--the people who built it, the spy who betrayed it, and the media event it inspired.



Michelle is reading *Good Energy* by Dr. Casey Means, MD, where you'll learn how your body works, the key reason why we develop symptoms and diseases (hint: metabolic dysfunction, a rampant phenomenon in our world), and how to eat and live for truly optimal health of the mind, body, spirit, and planet. Blending cutting edge science with timeless wisdom and practical strategies, this book is a clear and accessible roadmap for your healthiest and most fulfilling life.



Brooke hasn't started it yet but it is her read for the New Year: *The First Rule of Mastery: Stop Worrying About What People Think of You* by Michael Gervais, PhD. She recently heard him interviewed on a podcast and really enjoyed his perspective and hopes to lean into how she can be better for others.

# Outside the Office



One of Shawn's all-time favorite books is Danny Meyer's *Setting The Table*. It's a captivating story of hospitality and leadership within his renowned restaurant group (a must read!). Recently, he had the pleasure of dining at Blue Smoke in NYC with his family, where he shared his admiration for Danny and *Setting The Table* with their waiter. To Shawn's surprise, the manager, Ryan, presented him with their internal *Setting The Table* book, signed by Danny himself!



Michelle and her family along with their dog, Cooper, on Thanksgiving Day.

Brooke and Chase recently took Hunter and Parker to the Elk and Bison Prairie and to the see the lights around Patti's Settlement at Land Between the Lakes.



Jacqueline, Ben, and their girls at Christmas.