



The Palm Tree Quarterly



SUMMER IS HERE

Beyond kids at summer camp, heat waves and holidays we have stayed very busy at the office. Our NEW WEBSITE is live and we love it! Richard's beloved Panthers won the Stanley Cup again! The team has expanded as Hannah Smith, our new intern, joined us in June. Josh and Richard were honored (again) with the Circle of Excellence designation. We have been seeing great interest and participation in our [Financial Virtues Quiz](#) which helps you understand your own subconscious financial behaviors. Read on for much more...

CELEBRATING OUR CITY

Boca Raton turns 100 years old this year, and we have participated in many local happenings like Cars and Coffee, which returns in October and Creative Mornings at the Boca Museum of Art. We also had our profile featured in the Boca Centennial Edition of the Boca Raton Observer. Read the article in our "In the Press" section of our website.



HAVE YOU SEEN OUR SOCIAL MEDIA LATELY?

From timely money tidbits in under a minute on [LinkedIn](#), to local area interest videos on [Instagram](#) and full-length webinars on [YouTube](#), there is always something fun and interesting to add to your scroll!

The team works hard to offer education in many formats and if you are not connected with us thru social media channels, you're definitely missing out! Click below to go straight to our pages.



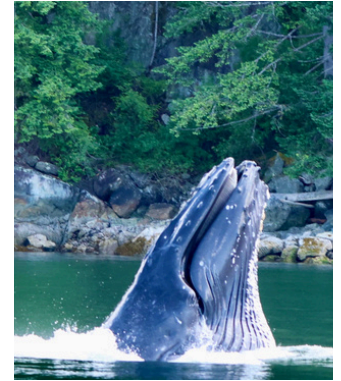
INTERNATIONAL TRAVEL



Cristal, our marketing manager, led a family expedition to South America in June. She traveled to Colombia, visiting the cities of Armenia, Medellin and Guatapé. The kids met tiny capybaras, witnessed the majesty of the Andes Mountains and saw the Botero sculptures. Pictured is 730 steps of “El Penol”, which is a must-see attraction in Guatapé. If you need coffee region travel tips, she’s always happy to chat.

CIRCLE OF EXCELLENCE TRIP

Josh and Richard, along with their wives, were invited to Whistler, British Columbia in Canada. They were recently awarded membership within the 2025 Circle of Excellence, which acknowledges the immense effort they have put into offering clients reliable guidance, managing their practice with honesty, and striving for excellence in every aspect of their work. Our founding partners enjoyed whale watching, black bear sightings, golfing with sweaters in the summer and other wildly un-Floridian activities, ask them about their trip on your next review!



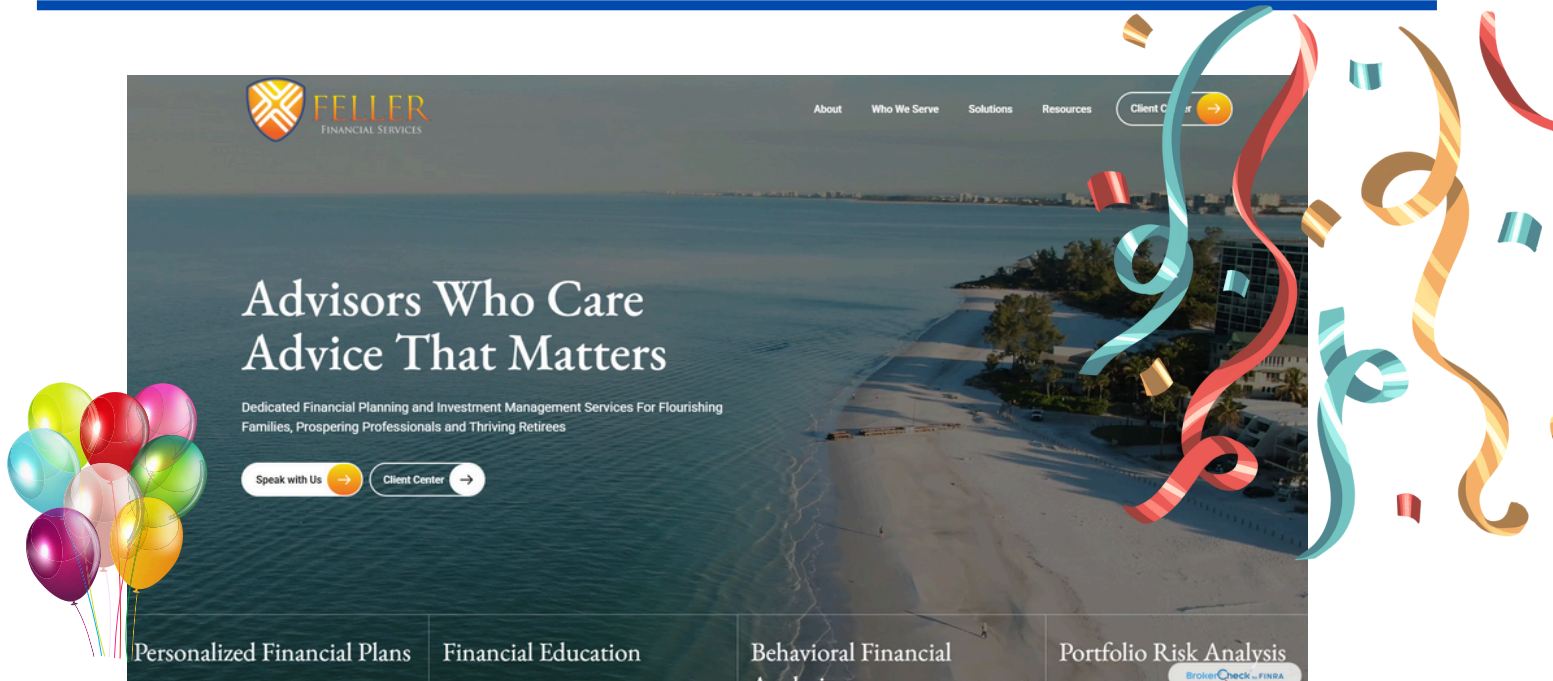
COMMUNITY CORNER

Josh Feller was asked to participate in a peer-to-peer panel discussion while in Whistler, for the Circle of Excellence trip. He spoke and answered questions from the best of the best advisors from around the country. The panel participants shared their knowledge on a range of timely topics including technology in the industry, client experience and business philosophy.



The Cetera Financial Group’s Circle of Excellence recognition was awarded to Feller Financial Services; it is not a guarantee of future investment success and should not be construed as an endorsement by any client.

IT'S ALIVE!! WELL, IT'S 'LIVE' AT LEAST, VISIT OUR **NEW WEBSITE**

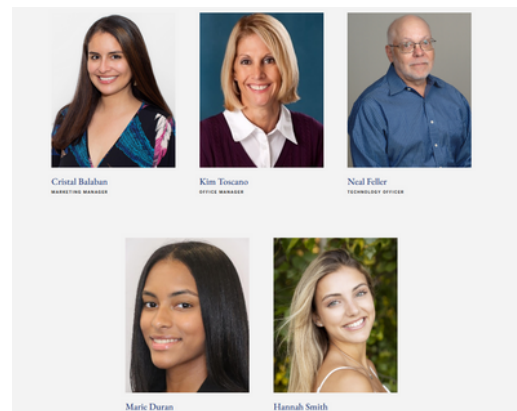


An all-new look is just part of our major website refresh. Search our Feller Financial Services on Google and you'll find that we have added a ton of new educational content. There are entire new sections, like our **Educational Webinars** Library direct link to the **Financial Virtues Quiz**. There are article, quizzes, of course the Client center and much more. Visit us online, stay a while and let us know what you think!

[**Go to Website**](#) >

THE TEAM EXPANDS

In June we welcomed Hannah Smith, current Finance and Economics student at Florida Atlantic University, as our newest intern. She hails from Columbia, Maryland and lived in Windham, New Hampshire for most of her life. Check out her profile along with the rest of the team [HERE](#)



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