



December 16,

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Mary Jewell, TS Prosperity Group

Mary Jewell, Vice President and Fiduciary Officer of TS Prosperity Group (TSPG), spoke at the meeting of the Optimist Club of Treynor on Saturday, Dec. 16. Mary has a law degree from Creighton University and has worked at TS Bank for five years. Her prior work experience includes charitable gift planning, donor development, and a trust officer. She is the mother of 6 children and she and her husband, Rod, live in Omaha.



Mary expressed that she loves helping people. The tagline of TS Bank is to Ignite Prosperity and her job is helping people with their money.

A practical, down-to-earth lady who has been involved in all kinds of cases, Mary expressed the following common sense advice: ***“It’s important to be able to sleep at night knowing rates will eventually go down.”*** The bank has a department of analysts who focus on researching investments and together they help clients figure out what types of investments are appropriate for them while yielding a good rate, but also minimizing risk.

She also helps develop estate plans for clients and had many stories to share. Another common sense statement: ***“None of us knows how the day will end.”*** Two musts are having 1) a Health Care Power of Attorney document and 2) a Durable Power of Attorney document for finances. These documents are effective only while you are living but allows one or more whom you name to

make decisions regarding health and finances in case you are unable. She recommends talking to the person(s) you designate so that person understands your wishes.

Mary also stated: ***“I’m the shoemaker without the shoes.”*** She indicated her adult children are single and she is planning on giving them their own Powers of Attorney for Health for Christmas!

Upon death is when a will goes into effect and the will identifies a representative (personal representative, executor or administrator) named in the will to handle your affairs. ***“Will your children still have Christmas dinner together?”*** Siblings fighting over stuff in the home is very common – the Kool Aid pitcher and Mom’s diamond ring. In NE and IA, you can have a handwritten laundry list designating who gets what.

Setting up a trust avoids probate and is more private. There are some charges, some processes to do this, but it can be a very effective way to handle your affairs. Trustees can be whomever you name, but the bank can also serve in this capacity. TSPG also works with conservatorships to help with the accounts of people with special needs.

“The State is where it ends up if you have no plan.” She expressed the goal of TS Prosperity Group is to make you money and encourage you to get your money where you want it – family members, charities. She said, ***“Get your paperwork done and make sure you review your IRA beneficiaries. Keep up to date.”*** TS Prosperity Group is willing to help.

Meeting Minutes

Keith Denton, President, conducted the meeting of the Treynor Optimists on December 16, 2017. Seventeen were present including five guests.

The meeting began with humor by Keith Denton followed by the pledge of allegiance. Gary Guttau offered the prayer. Dee Guttau won the 50/50 drawing. Gary Funkhouser won the attendance prize.

Judy Guttau donated to the Youth Fund because of the Treynor basketball wins against IKM and for the good start of the Treynor wrestling team at the WIC meet this weekend. Gary Guttau contributed for Conner Sudmann's outstanding game.

Kevin Underwood paid \$1 to observe his birthday.

Gary Funkhouser presented a High School Evaluation Score Card for the WIC conference. Treynor was in the High Achieving category based on graduation rate, attendance, math and reading scores, college and career readiness, staff retention, annual expected achievement growth, and closing of achievement gaps.

Music instructors Jeff Schoening and Jill Davis accompanied students, Tyler Pollock and Allison Green, who received the \$789.65 check from the can kennel sorting for the Treynor Music Boosters. The money will be used for instruments, music, etc. Jeff Schoening indicated there are certain instruments that are provided for the Music Department. A tuba can cost \$8000!

We were reminded that the Christmas Concert is Monday, Dec. 18. Middle School performs at 6:30 PM and the High School performs at 8 PM.

Optimist helpers with the can kennel for the Jr. After Prom Committee on Wed. were Gary Guttau, Chad Guttau, Gary Funkhouser and John Klein. The next sorting will be at 4 PM on Wed., Dec. 27.

Calendar

Dec. 27 – 4:00 Can Kennel Sorting

Birthdays

Dec. 23 – Chuck Nielsen

Anniversaries

Dec 27 – Gary & Dee Guttau

Judy Guttau, Editor, 31107 Dogwood Rd, Treynor, IA 51575
402-670-4330 judy.guttau@tsbg.com
Dues/Donations/Flag Money: Mail to Optimist Club of Treynor, PO Box
354, Treynor, IA 51575

Gary Funkhouser announced that the legislature is getting pressure from the Iowa grocers to eliminate the current bottle law. This could impact our can kennel program. Contact your legislator.

Gary Guttau announced there are two members yet to pay. It is important they do so by Dec. 31.

Gary Funkhouser announced that tentatively a Zone Meeting is planned at 9:30 AM on Sat., January 27 at the Treynor Community Building. Dee offered to bring cinnamon rolls.

It was decided to wait until January to determine a date for an Optimist Board Meeting. There will be no club meetings Dec. 23 or 30. The meeting was adjourned and the Optimist creed was stated.



Tyler Pollock and Allison Green receive can kennel check from President Keith Denton.

Optimist Club meetings run from 8-9 AM Saturday mornings at the Treynor Community Building (Legion Room). Come join us in helping support our youth and learn from great speakers!

Merry Christmas and Happy New Year!

Programs

January - John Klein
February - Chad Guttau

Speakers

Jan. 6 – Glenwood Resource Center tour
Jan. 13 – Tom Becca, radio and TV personality

