
THE LOCKSHIELD LETTER

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LOCKSHIELD PARTNERS' QUARTER THREE UPDATE



Here at Lockshield Partners, we consider our team to be a family. We are happy you are here and hope you enjoy seeing what our team is involved in outside of work. We believe the best way to make a difference in the world is to be involved with family, friends, and our communities.

LOCKSHIELDPARTNERS.COM

BUSINESS UPDATES

ECONOMIC UPDATE

The S&P 500 officially entered a new 'bull' market in the 2nd quarter, although the index still remains roughly 10% below its January 2022 all-time high (at the time of publication). The bottom of the market cycle occurred in mid-October of 2022. Since that time, the S&P 500 has increased by 20% in value. Once an index increases by 20% from the low-point in a 'bear' market, the index is classified as being in a new 'bull' market. A 'bear' market occurs when an index declines 20% from the high-point in a 'bull' market. The origination of the terms 'bear' and 'bull' market is in reference to the way that each animal attacks an enemy. Bears strike down with their paws, while bulls thrust up with their horns.

Therefore, investors refer to upward market movements as 'bull' markets, and downward market movements as 'bear' markets.



MIDYEAR FINANCIAL CHECKLIST

The end of June brings lots of sunshine, days at the pool and golf course, and quality family time. It also presents a great opportunity to revisit and revise your annual financial planning goals. The middle of the year is a good time to update your personal balance sheet, check in on your budget, increase retirement contributions, and ensure that you're setting funds aside for Christmas (only 6 months away!).

The middle of the year is also a good time to eliminate unused subscriptions and update your passwords.



WHERE DO YOU LOCKSHIELD?



Jodi visiting St. Magnus Cathedral
in Orkney Isles, Scotland!



Darcy, modeling our newest cap!



John and Dan stopping for a hike
at Lake Louise on their drive to
Alaska



Ronnie and Dan hanging out at BG
ballpark!



Becky on a blustery day in
Scotland!



Lester enjoying his new Lockshield
hat.



Ben and Dan casting (not fishing) in
Orange Beach, AL



Emma snagging a photo op with
Joey Chestnut at BG ballpark!



Jodi at the Tower Bridge in
London, England

WELCOME TO LOCKSHIELD

Our Lockshield Accounting team is growing, and we are so honored to introduce our two newest employees!

Welcome Rod Dunning! Born in Memphis and raised in Texas and Colorado, Rod is a graduate of Colorado State University, Virginia Beach Theological Seminary and Western Kentucky University. His work experience includes working as a budget analyst at a public university and most recently as a social studies teacher at a local middle school.

He has enjoyed making Kentucky his home the past few years and looks forward to putting his studies in economics, accounting and taxation into practice at Lockshield Partners as one of our Staff Accountants. He is enthusiastic about creating and strengthening relationships and seeing each client succeed.

When not in the office, Rod enjoys spending time with his wife traveling all around creation and enjoying the home cooked meals she makes. He can be found playing cardio tennis most Wednesday mornings and pick-up tennis throughout the week. Reading books on theology and listening to sermons are some of his favorite pastimes.



Lockshield Partners Accounting Services welcomes Drew Childress to our team. Drew was born and raised in Hart County where he, his wife and son still reside. He is a graduate of Western Kentucky University with a Bachelor's Degree in Accounting.

Drew's role as Payroll Administrator is integral in maintaining efficiency and organization for our clients.

When Drew is not at the office, he enjoys spending time with his wife and son, going to the park, golfing, and just being outside.



HOT RODS NIGHT!



We were thankful to hang out with Michael, Tasha, Carl, Hadley, Jack & little Haylin!



Some of our Lockshield Family!



"Duncan Hines Days" festivities transformed our BG Hot Rods into the "Hot Dogs" this week!



Jeremiah's son, Grant, throws out the first pitch and also hangs out with Joey Chestnut!



Matthew and friends dress up for a game in between innings. Nice job, fellas!



Our friends, Nick and Stacy, enjoying the night!



Chris and Laura made it a family night! Shout out to Gerald Printing for our Hot Rods shirts!



Beautiful night to cheer on the Hot Rods with Terry, Fran, Nolan & Foster!



Weldon & Phyllis said, PLAY BALL!



OUR FIRST ANNUAL LOCKSHIELD PARTNERS "ARTHUR COTTON MEMORIAL" SCHOLARSHIPS

Meet our 2023 Recipients!



**HAYLI
JACKSON**

BARREN COUNTY
HIGH SCHOOL
2023 GRADUATE

HAYLI PLANS TO ATTEND LINDSEY WILSON COLLEGE AND PURSUE A DEGREE IN BUSINESS ADMINISTRATION WITH AN EMPHASIS IN MARKETING, ALONG WITH A CONCENTRATION IN ENTREPRENEURIAL APPLICATIONS, AND A MINOR IN ACCOUNTING. HAYLI'S HOBBIES INCLUDE JEWELRY MAKING, READING, AND SERVING AT HER CHURCH. SHE ASPIRES TO BE A BUSINESS OWNER AND FASHION DESIGNER. HAYLI IS GRATEFUL TO HER MOM FOR ALWAYS PUSHING HER TO DO HER BEST!



**ELEANOR
WOODIE**

GLASGOW HIGH SCHOOL
2023 GRADUATE

ELEANOR PLANS TO MAJOR IN BUSINESS MANAGEMENT WHILE ATTENDING SAMFORD UNIVERSITY. SHE PLAYED SOCCER AND TENNIS FROM A YOUNG AGE THROUGHOUT HER SENIOR YEAR. ELEANOR ENJOYS PLAYING THE PIANO, SINGING, PHOTOGRAPHY, AND LOVES SERVING IN HER LOCAL CHURCH AND COMMUNITY. HER PARENTS ARE JORDAN AND LARISSA WOODIE.



Jodi, along with her mother and sister, were thrilled to present Eleanor and Hayli with the first annual Arthur Cotton Memorial Scholarships in honor of Jodi's late father. The Hall of Honor ceremony was held at Barren County High School Auditorium in June.

THE LOCKSHIELD MINISTRY

MINISTRY SPOTLIGHT - LIFE'S BETTER TOGETHER "LUCK CASINO NIGHT"

Luck Casino Night, "Ballgowns + Bow Ties", raised money for the non-profit, Life's Better Together. 100% of the proceeds benefited local families battling a critical illness by paying for things such as practical household bills and transportation expenses.



It was a fun night raising money for a great cause.



Dan, John, and friends looking great in their bowties!



Dan and Claire having some photo booth fun with Cravens and Leslie

MINISTRY SPOTLIGHT - HOLY SPIRIT GOLF SCRAMBLE

It was a beautiful day for golf! Clark, Jeremiah, and their teams spent the day in friendly competition at the Holy Spirit Golf Scramble. Each team also had the chance to use an air cannon to reach the green. Unfortunately, no first place finishes this year - Jeremiah's team placed 2nd and Clark's team placed 4th.



Greg was a natural with the air cannon!



Jamie enjoyed welcoming players at registration.



Team Lockshield ready to tee off!

THE LOCKSHIELD MINISTRY

MINISTRY SPOTLIGHT

"A CUP OF GRATITUDE"

There are so many businesses and individuals who serve our community in wonderful ways. We had the pleasure of visiting our friends at Bowling Green Internal Medicine & Pediatric Associates and Bluegrass Oral Health Center of Bowling Green with drinks from Tin Roof Coffee! As employees waited for their drinks, they also shared with us all the things they are thankful for. We ended the morning with our cups and hearts filled! We look forward to continue spreading gratitude to businesses in our community!



MINISTRY SPOTLIGHT - BOYS TO MEN

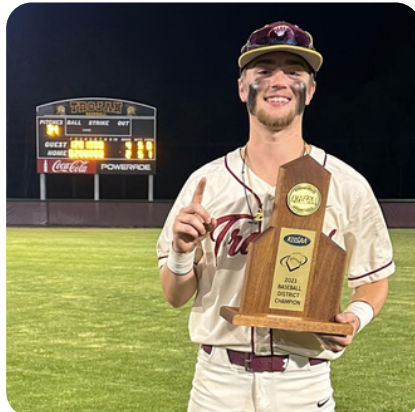
We are proud supporters of Coach Tyreon Clark and the work he does with Boys to Men. The organization serves young men in the area by teaching them life skills and providing fatherly figures. Clark, Dan, and Jeremiah all attended the annual breakfast with Dad's at WKU's Knicely Center.



THE LOCKSHIELD FAMILY



Matthew & Ben, juniors in high school, have begun college visits! Mom & Dad aren't ready to let 2 go at one time!



Jackson celebrates a District Championship. Congrats, Trojans!



Matthew playing Lacrosse for the BG Purples. Get out of his way!



Caleb celebrating the middle school district championship!



Ben playing lacrosse for the BG Purples. Look at those hops!



Elizabeth had her first dance recital this spring - what a natural!



Price showing off the 15th District trophy. Go Trojans!



Lane and Drew celebrating the Cal Ripken District 6 Runner-up



Madelyn & Grayson, grandchildren of Marcia, played soccer for the Glasgow Parks & Recreation League. Madelyn's team lost one game & Grayson's team was undefeated.

THE LOCKSHIELD FAMILY



Jodi at the Scott Monument in Edinburgh, Scotland



Drew and his son enjoying the warm weather. This little guy is ALWAYS smiling!



At a recent ball tournament, Caleb played against a team & one of the players happened to be the son of country music/American Idol star Luke Bryan. He was kind and gracious enough to snap a quick picture for a fan!



Madelyn in "Newsies Jr." at Barren County Middle school in May.

THE LOCKSHIELD FAMILY



John had the opportunity as captain to address the Maryville University Roller Hockey team at their team banquet just prior to going to play in the D3 National Championship in Irvine, CA.



Carmen and Cailee came to us through the Barren County co-op program, and we were beyond blessed to host them as interns this year. Both ladies graduated high school this year and we were thrilled to celebrate with them. We're proud of you, ladies!



Grant, Jeremiah, and the Braves celebrate a victorious Little League season. Coach Jeremiah and Grant are excited to continue the summer of baseball with the BG East Allstars!



The Hayden family is excited to introduce Millie Margaret! Millie was born on May 2 and is the happiest baby. Big siblings, Jackson and Elizabeth, are so proud of their baby sister!



LOCKSHIELD —PARTNERS—

TOGETHER, WE PLAN.

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