

Wayne's World

Sage, Rutty and Company

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We have two new members to our Sage Rutty family to introduce to you this month. Our newest advisor is Dave Swain. You will know him as our next second career law enforcement officer that Curt is working with. Let me tell

Communication, Team work, and Problem-Solving skills.

His experience as an officer, as well as, working alongside various agencies helped him develop extensive knowledge in the

Our first "Employee Spotlight" is presented this month. I offered to be the test case, so you would understand what we are trying to accomplish. Every other month, Kathy will interview additional employees to give us all a deeper look into who they are and what makes them tick. Thank you, Kathy.

you a little bit more about him. David recently retired as an Investigator with the Rochester Police Department. David most recently worked as a Federal Task Force Officer sponsored by ATF, but also included time as a SWAT team member and instructor at the Police Academy. As a police Officer he developed his

local, state, and federal retirement systems, as well as, experience with their deferred compensation plans. Prior to retiring, he became licensed in New York State in Life, Accident, and Health Insurance. He also holds Series 7 & 66 licenses with the Financial Industry Regulatory Authority (FINRA).

Our Habitat for Humanity Build Begins

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We started our Habitat for Humanity build this past month. Unfortunately, due to a City of Rochester oversight, the first few weeks of our build will be on other houses nearing completion. The foundation of our house should be happening as you read this newsletter, so we should be working on "our house" very soon. We will grab additional days this fall to help those of you who may want the experience of helping to build our home. I am hearing from those who have worked on the build, that it has been terrific. Some have had a chance to work along side the future owner of the property and can see first hand how this work is changing the lives and neighborhoods. Thank you!

Originally from the downstate area he attended and graduated from SUNY Geneseo and was a member of the Sigma Tau Psi fraternity. David and his wife, Erin, love to travel and embracing what upstate NY has to offer. This includes taking their two dogs to the local parks, pit stops throughout the finger lakes region, and working at their parent's equestrian farm in Ithaca. Please be sure to continue to give Dave a hearty and warm Sage Ruttly welcome.

Welcome also to Donna Jaronszek. Donna has joined your company to help in our reception area and be our back up "Director of First Impressions". There is not a more important role to be played here. As the first point of client contact in delivering a memorable client experience, we have been blessed with Donna's arrival. I had a chance to learn more about Donna over lunch recently and I can tell you that she is a wonderful person and a perfect fit for what we all work so hard to build. Donna joins Sage Ruttly with many years of Human Resources and Executive Administration experience with companies such as Eastman Kodak, ESL Federal Credit Union, Danka/Pitney Bowes, including the last 15 years in

Human Resources at ACM Medical Laboratory, Inc. Although Donna retired from ACM in February of 2018, she found the unstructured life a bit challenging and decided it was time to get back into an office environment on a part time basis. She and her husband Tom married in 2018 and live in the town of Gates. Their now combined family includes 6 children and 18 grandchildren. Donna currently serves on the volunteer continuance board of Rochester Koinonia, and volunteers as Recording Secretary, Associate Treasurer and Pastoral Chairperson at her local church. She has enjoyed missionary journeys to Africa, Ukraine, Egypt, Israel and Mexico working with prisoners, orphans and more. Seems like a perfect fit! Please continue to welcome Donna into our Sage Ruttly family.

Speaking of Sage Ruttly people, here are some reminders of things from last month involving "our" people.

We officially have a Financial Planning Department, Yeah! Aaron has now moved full time in supporting our growing Financial Planning Department. It has always been important work and will become even more important

as our industry continues to evolve and change. Aaron has jumped in with an incredible amount of enthusiasm and a thirst for learning. Aaron's addition will allow Victoria to deliver an even greater number of planning services as time goes on. We have seen some of it already!

Congratulations to Ryleigh who continues to assemble the requisite licenses to continue onward on her path as a Junior Advisor on Trina's team. She has now successfully obtained her Series 66 License and is beginning to sit in on client meetings with Trina to begin to learn the "Art" of our business. Congratulations Ryleigh and Team Trina!!!

We had a big month of fun fundraising opportunities for great causes. Brennan headed up a merry band of bowlers who raised \$875 for Junior Achievement. Connor, Ryan, Maggie, Lauren and myself rounded out this group! More than \$10,000 was raised that evening for a great cause.

The Kentucky Derby brought out the gaming side of everyone as well as the hat lovers with our annual Derby Days! Those who picked the winning horse split half of the pot with the balance going to 21 Stories for Scouts and the \$ for Jeans Day. We raised

over \$200 and applied that to Colin's drop of 21 stories pot. Jen won the Hat contest against some tough competition.

Colin helped to raise more than \$1,000 for 21 Stories for Scouts. Some of his Sage Ruttly family kicked in a few bucks to make that happened. The pictures of Colin's descent were downright scary, and his accounting of the experience was just incredible. Easing himself over the ledge to begin his descent was the hardest. That is before the wind kicked up and started to swing him from side to side! Colin, well done. Next year.....Doug?

Sage Ruttly had another wonderful year for the annual United Way campaign. Sage Ruttly matched new pledges and increases over last year bringing a total raised by the firm and the participating employees to almost \$35,000!!! With the largest of the Rochester public companies shrinking or going sway altogether, our community must now rely on the smaller employers. I am always proud to hear our name at the top of the list for contribution per employee. We give at a higher lever than most. Thank you again for your continued support.

And maybe let's finish off where we began with H4H.

While it is a corporate contribution that makes this possible, we kicked off the build with a full breakfast and presentation by the Executive Director of Habitat for Humanity. His excitement was evident as he spoke of the work to be done. We will be changing lives and neighborhoods. Now that is cool!

Sage Ruttly rolled out its new Volunteer Time Off Benefit. It aligns so much with our Core Values that we did need something in place to help manage the work our people want to do for community organizations they support. I too believe that as we share the good work that our colleagues support, it will let us better understand them and what is important to them. This new benefit not only supports our Core Value of Strengthening and enriching our community but also of Building a positive team and family spirit.

We had another strong month in May with 6 teams/advisors hitting a new Rolling 12-month Highwater Mark. *

Katrina	1,012,000
Curt	571,000
Doug	517,000
Jim B	517,000
Craig	517,000
Sandy	394,000
Kris	377,000*
Randy	376,000*

Zach	376,000*
Kim	370,000*
Neil	319,000*
Laura	319,000*
Christine	297,000*
Joe	265,000
Pina	205,000
Brennan	196,000
Steve	191,000
Winsome	154,000
Laura P	143,000*
Dave	122,000
Jim C	118,000
Connor	110,000

We are making incredible progress towards our BHAG! The markets are helping for sure, but your asset gathering continues to march forward. As we get in "spitting distance" we will have to plan a great celebration to mark the attainment of this great goal.

Thank you for the privilege of writing this newsletter. Have a great month ahead!

Wayne


Sage Ruttly Core Values
Do the right thing, always
Encourage individual ability and creativity
Build a positive team and family spirit
Strengthen and enrich our community

Sage Ruttly Core Purpose
Sage Ruttly is the partner of choice for Financial Professionals seeking

supported independence, an engaging peer network, extraordinary client

relationships, and the opportunity to shape the company's future.

Employee Spotlight – *Wayne Holly*



I think that it is fair to say that as employees of Sage Ruttly, we each have had an opportunity to build individual relationships with Wayne Holly. How often does that happen in a work place? Instead of being just one of the numerous cogs propelling a company forward, we are all working with a man who genuinely cares about us, wants to see us succeed and who will always take the time to help and encourage us. When we succeed, Wayne the father figure cheers us on, celebrates our milestones and rejoices our accomplishments like any proud parent. We each have a relationship with Wayne. But what do we know about him? Most of us, excluding Trevor and Connor, know Wayne Holly, President and Chairman of Sage Ruttly. But who is Wayne Holly away from our spirited halls? With a list of questions in hand, I recently spent some time with Wayne to get a glimpse of his life when he is not manning the helm of Sage Ruttly.

My first question was to find out a little bit more about

Wayne and how he and Judy became involved with foster care. We all know that Wayne and Judy have huge hearts and that they have been fostering children for the past 20 years or so. Their decision to foster came after Jessica began school and the presence of a baby in the house was missed. They quickly found themselves bringing home babies in need of the nurturing love that their family could provide. Currently, they are fostering their 53rd child.

You would think that the foster care experience, coupled with raising their own six children (Trevor, Jared, Connor, Sean, Jessica and Shane) and being a grandfather to four would make Wayne an expert in handling young children and their boundless energy! I was a bit surprised by Wayne's answer to my next question. When I asked him what he would be terrible at doing if Judy were to give him a "Honey-Do" list, Wayne answered that he would be terrible at caring for the kids for more than 48 hours as he

lacks the temperament and patience to handle young children for so long!

Wayne had to think for a few minutes about my next set of questions. First, I asked what skill he would like to master if he could. Enthusiastically, Wayne told me that he would love to learn to restore cars or motorcycles. I watched Wayne's eyes briefly glass over as he visibly daydreamed about a metallic blue 1970's Chevelle SS. Wayne rapidly fired off vintage features describing the small details that he would include while restoring this dream car. I'm sure that it's a beauty!

My next question centered on adventure and what would be the most amazing trip to go on. Wayne told me about how he and Judy would like to go on a safari in Africa or to see the Fjords and the Aurora Borealis in Norway and Sweden. I asked him if he was the thrill-seeking type that would want to experience some sort of rush while on one of these trips (thinking Devil's Pool at Victoria Falls).

Wayne's answers were evidently driven by thoughts of Judy and that she would not want to do anything that daring. Observing this, I asked him what he would do if the trip were solo. With a big smile, Wayne told me he wouldn't hesitate to hike Mt. Kilimanjaro.

I still wanted to know a bit more about Wayne's home life. Wayne's days generally start out with him waking up the kids, followed by making Judy her coffee and a trip to the gym when his schedule permits. Shifting gears, I asked him how he relaxes after a long and difficult day. Wayne's cure for a grizzly work day would be a vodka tonic, enjoyed outside on the patio with Judy, followed by making dinner together and listening to music. I asked Wayne if he enjoys reading to help take his mind off some of the day to day pressure and stresses. While he admitted that he does like to read, he isn't one for reading fiction. Most of Wayne's reading centers around industry related books and magazines, peppered with the occasional biography. Two biographies that he recently enjoyed were about Steve Jobs and Paul Newman. Moving on, I quizzed him about television and what is in his Netflix queue. Wayne said that he is really looking forward to the next season of *Game of Thrones* and that he had recently enjoyed watching *Shameless* and binging *The Sopranos*!

We took some time to discuss some of Wayne's past work experience and what he would be doing if he had explored an alternate career path. In the late 1970's, Wayne worked on the publishing side for Chuck Mangione's company Gates Music. This connection gave Wayne the opportunity to attend the Grammy Awards in 1979! How many people can say that they have been invited to attend the Grammy's? Hearing this, I had to do a little homework to see who some of the big winners were that night: Record and Song of the Year went to Billy Joel for "Just the Way You Are" while other top winners included Barry Manilow, the Bee Gees, Dolly Parton and Willie Nelson. It must have been one wild party as Chuck Mangione also won a Grammy that night for Best Pop Instrumental Performance. Wayne still has his tickets from that memorable evening and a gold lapel pin that Chuck gifted him with as a remembrance. Stop by his office and ask him about these. I'm sure he will be happy to show you these mementos while sharing his memories about that night in music history.

When asked if he could see himself working in any other career, Wayne responded that he would undoubtedly be in some sort of business. He said that he enjoys and pays attention to small details, so possibly running a hotel or being a realtor. One thing is

for certain though, his experience working with Habitat for Humanity has given him a new satisfaction and enjoyment. Wayne said that after he retires, he wouldn't hesitate to volunteer weekly to work with Habitat for Humanity. Seeing the physical structure take shape from beginning to completion brings excitement and fulfillment to Wayne.

Like everybody else, Wayne has his worries. Each day, Wayne strives to make Sage Rutty the best that it can be and a great place for all of us to come to. A lack of clairvoyance regarding future challenges that our industry will face going forward and how we will transition to a fourth generation of Holly leadership are just a couple of the facets that weigh heavily on Wayne's mind. However, seeing the people here developing as professionals, doing all the right things and growing eases this tension and makes his days and outlook for the future better. We're all in this together!

My final question to Wayne was to ask what he would advise everybody to do at least once in their life. Wayne's answer to this was so appropriate for this man who so evidently loves his family. "Save one child."

Thank you, Wayne. Thank you for all your years of selflessness to Sage Rutty, to the Rochester community and to your family. We appreciate

you and all that you do to
make Sage Ruddy a top work
place in America!