

YHB HAPPENINGS

We are pleased to introduce three new members of our firm.

**Linda
Fallon**

Linda A. Fallon, CFA, is our newest Senior Portfolio Manager. She has a distinguished background with investments and trust portfolios and has been a Vice President and Portfolio Manager at JP Morgan, Fleet Investment Advisors, and Society for Savings. She earned an MBA degree from Notre Dame after graduating from Saint Joseph College in West Hartford.

**Steve
Hannigan**

Steven T. Hannigan has joined our full-time staff as an Assistant Portfolio Manager after interning at YHB during the past several summers and school breaks. He is a West Hartford resident and graduated from St. Mary's College of Maryland in 2010 with B.A. degrees in Economics and History. Steve is the son of one of our Senior Portfolio Managers, Dennis Hannigan.

**Diane
Daley**

Diane A. Daley has also come on board as an Assistant Portfolio Manager. She comes to us with a B.S. degree in Management Information Systems from Central Connecticut State University and a Master's degree in education from the University of Hartford. Diane has filled roles in information systems and management for CVS and has taught in the public school system.

**Community
Service**

We want to thank those of you who supported our community Foodshare Walk Against Hunger in May. We surpassed our goal and raised \$2,840 to help the organization's fight for a hunger free community.

Paul Martel was interviewed by Scott Slifka, the mayor of West Hartford, regarding the medical clinic that Paul established in Riobamba, Ecuador. Employees of YHB have supported Paul's work with the clinic in a variety of ways. You can view a replay of the interview at www.whctv.org. Click on Video on Demand and select Mayor's Report/ Clinica Dulce Refugio.

We recently participated as a champion sponsor of Celebrate West Hartford and continued our support of Foodshare by sponsoring their participation as well. For visitors to our booth, we prepared a "Personal Organization Kit" that is now accessible via our website. On the back of this newsletter you can find the items that are included and directions for downloading your own copy for personal use or to share with family members or friends. Please do not hesitate to contact us if we can assist you with any aspect of your financial planning activities.

✧ June 2011 ✧

Paul R. Martel, President ♦ Neil Kelleher, CFA, Senior Investment Officer
Mark W. Everette, CFA, CPA, CEO and Senior Portfolio Manager ♦ Jared P. Soper, Senior Portfolio Manager
Dennis P. Hannigan, CFA, Senior Portfolio Manager ♦ Michael R. Pelosi, CFA, Senior Portfolio Manager
Judith P. Havard, CFA, Senior Portfolio Manager ♦ Jessica Kott, CFP®, Senior Portfolio Manager

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PERSONAL ORGANIZATION KIT

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RECOMMENDED REFERENCES

To access your Personal Organization Kit, go to www.yhbia.com and look for the “Personal Organization Kit” link. You can download the document in either a PDF or Word format.

