MICHAEL **HARTLETT**

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SUMMARY

I have been a Mason since 2011. Received the 32nd degree in Scottish Rite. Started my journey in York Rite and went through the chairs in all three bodies. I was MEHP for Royal Arch Chapter 43, in 2015, TIM for Goodwin Council 19 in 2017/2018, EC for Commandery #13 in 2016/2017. I currently serve as Secretary for Chapter 43, and Recorder for Commandery 13.

I am on the board of the Lancaster Masonic Center and on the Board of Governors for the Lancaster Children's Dyslexia Center.

I want to be of service to the Grand Commandery of Pennsylvania by using my experience and knowledge to help provide insight and guidance with regard to the investments of the Permanent fund.

SKILLS

- Advising on investments
- Developing financial plans
- Stock market expertise
- Equity and fixed income research
- Risk management expertise

EXPERIENCE

Financial Advisor

Financial Network Inc. – East Petersburg, PA

I am 71 years old, and have been a financial advisor since 1982. I am an independent advisor and money manager with over 200 clients and managing over $50 million of client assets. I am a Certified Financial Planner since 1987, a registered securities representative with LPL Financial and hold the designation of OSJ (office of supervisory jurisdiction) supervising 6 (six) other advisors. I have the series 7, 24 and 65 securities licenses registered with both Federal and State agencies. I served on the board of directors for an Atlanta Based Broker Dealer from 1989 through 1993. I was appointed to product advisory boards for Kemper Life Insurance for their annuity products, and Putnam Mutual Funds for their stock and bond funds.

In my private practice I :

- Articulate the value of various financial products, including stocks, bonds, mutual funds, and insurance policies; educate clients on benefits of individual products.
- Counsel clients on financial matters and provided recommendations on investment opportunities, products and services based on client needs and asset availability.
- Assist clients with planning for and funding retirements using mutual funds and other strategies.
- Have gained valuable insight in structuring portfolios to meet client needs.

I currently manage over $2 million of Masonic Lodge funds for 9 (nine) lodges in the Lancaster, York county area. I do not accept any commissions or fees for this work. It is my way of giving back to Masonry and helping these Lodges.