

intelligents

july 2026 newsletter

It's crazy that mid-year is already upon us! The first half of this year has been an exciting one for our team. We've continued to grow, welcomed new teammates, strengthened client relationships, and made meaningful progress toward our strategic goals.

As we begin the second half of the year, I'd like to challenge each of us to think about a few important mid-year checkpoints.

1. Welcoming Our New Teammates

We've been fortunate to welcome several new team members to intelligents during 2026. Every addition brings fresh experiences, new ideas, and unique perspectives that make us all stronger.

Have you taken the time to introduce yourself, answer questions, include them in conversations, and help them feel like part of our team? Just as importantly, have you taken the opportunity to learn their story? We have been so fortunate to attract really talented professionals who are great teammates. We can learn just as much from them, and I encourage you to hear their story and understand where we can potentially leverage their skill set.

2. Personal Growth Plan

Take a moment to reflect on your Personal Growth Plan. Are you making the progress you hoped to make this year? What obstacles are standing in your way? What skills are you developing that will help you grow personally and professionally?

Share your feedback with your leadership during this quarter's check ins. We are committed to helping every team member continue to learn, improve, and reach their potential.

3. Client Experience

Perhaps most importantly, I encourage everyone to think about the experience we're creating for our clients.

Our industry continues to evolve at a rapid pace, and so do the expectations of those we serve. What have you learned from your client interactions during the first half of the year? What feedback have you received? Where can we simplify, communicate better, respond faster, or deliver even greater value?

4. Lean Further into the Human Relationship

We have all seen the stats that show healthy relationships often are attributed to living longer. As AI continues to evolve, the importance of the human component to what we do will be magnified. One thing I love most about our business is the ability to impact one's life far beyond finances. There are so many opportunities in every client engagement to go the extra mile for someone, and that is going to be a key driver of our future success.

As we move into the second half of 2026, I encourage each of you to approach the months ahead with an abundance mindset. There is tremendous opportunity in front of us. When we freely share knowledge, celebrate one another's successes, welcome new teammates, invest in our own development, and continually seek ways to improve for our clients, we all succeed together.

I'm incredibly proud of what we've accomplished so far this year, and I'm even more excited about what lies ahead. Thank you for your hard work, your commitment to one another, and your dedication to our clients.

-Nick Madl



important dates

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1	2	3 Office Closed, 4 th of July	4
5	6	7	8	9 All company meeting	10	11
12	13 Cultural Enrichment Committee Meeting	14 Pre-Retirement Webinar	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

- 7/3 - 4th of July, Office closed
- 7/9 - All company meeting
- 7/13 - Cultural Enrichment Committee Meeting
- 7/14 - Pre-retirement intelligencast webinar

happy birthday!

Brandon Budd - 7/6
David Busselman - 7/7
Kyle Nelson - 7/7
Charlene Sukhram - 7/7
Kaden Evans - 7/8
Rob Mastel - 7/14
Devin Reimer - 7/14
Jeff Belton - 7/18
Connie McCleary-Geiger - 7/27
Craig Korol - 7/30

happy anniversary!

Kevin Dulitz - 7/1 - 35 years
Megan Taylor - 7/1 - 5 years
Nicholas Holmes - 7/15 - 7 years
Sheri Teichmann - 7/15 - 9 years
Kyle Nelson - 7/24 - 3 years
Grace Doole - 7/29 - 2 years
Matt Walter - 7/15 - 3 years



quality
"A" papers



innovation
pioneers



courage
willing to be first



passion
love for what we do



collaboration
play well with all

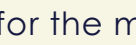
core values



employee highlights

Quarterly EOS Leadership Meeting

Our leadership team recently came together for our quarterly EOS meeting to reflect on progress, review priorities, and align on what matters most for the months ahead.



employee spotlight



Alex Jantsch

overland park • director of
investment research

What's your hometown? Kansas City, Missouri

Do you have pets? Species/names? Rudy (Yellow Lab) is 12 years old and Fez (Betta Fish) is 1.5 years old

What was the most embarrassing fashion trend you followed when you were younger? Jean shorts, maybe. I've never had any sense of fashion whatsoever. A constant embarrassment for my wife nowadays, but I avoided most fashion trends growing up through sheer ignorance.

If you could have any superpower, what would it be and why? Teleportation. Quicker/easier travel, easy escape from boredom or danger, more time spent with loved ones, etc.



connect. grow. thrive.

Are you looking to foster connections and strengthen your relationships with colleagues from different office locations? Here are some opportunities to consider joining:

- Mentorship Program
- Cultural Enrichment Committee
- Women Empowering Other Women

Reach out at mandie.scott@intelligents.com for more info.