

# LISTS & LEADS

THE LISTS

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October 13, 2014 · www.LVB.com

Next week's lists: Office Equipment & Furniture Companies, Commercial Cleaners

## CALENDAR

### Monday, Oct. 13

**Held by:** Northeast Pennsylvania Manufacturers and Employers Association  
**Summary:** Planning, organizing, prioritizing  
**Where:** Top of the 80's, 3 Top of the 80's Road, Hazleton  
**Time:** 9 a.m.-4 p.m.  
**Cost:** \$155 members, \$310 nonmembers  
**Contact:** Chris Robbins at 570-622-0992 or crobbs@maea.biz

### Tuesday, Oct. 14

**Held by:** Open Door Public Relations  
**Summary:** Jacking up your 30-second introduction  
**Where:** Buca di Beppo, 714 Grape St., Whitehall  
**Time:** 1:15 p.m.-2:45 p.m.  
**Cost:** \$16 in advance, \$20 at door  
**Contact:** Rita Guthrie at 610-703-5878 or idealady@opendoorlv.com

### Tuesday, Oct. 14

**Held by:** Steve Gunn Coaching  
**Summary:** Lehigh Valley business owners meet-up  
**Where:** Wegmans (fireplace room), 3900 Tilghman St., Allentown  
**Time:** 8-9 a.m.  
**Cost:** Free  
**Contact:** Steve Gunn at 610-392-2810 or steve@coachstevegunn.com

### Wednesday, Oct. 15

**Held by:** Greater Reading Chamber of Commerce & Industry  
**Summary:** Berks Family Business Alliance Fall Forum  
**Where:** Crowne Plaza Reading, 1741 Paper Mill Road, Wyomissing  
**Time:** 7:45 a.m.-1:30 p.m.  
**Cost:** \$20  
**Contact:** 610-376-6766 or www.greaterreadingchamber.org

### Wednesday, Oct. 15

**Held by:** Greater Reading Chamber of Commerce & Industry  
**Summary:** Networking lunch  
**Where:** Galen Hall Golf Club & Restaurant, 645 N. Galen Hall Road, Wernersville  
**Time:** 11:30 a.m.-1 p.m.  
**Cost:** \$15, includes lunch  
**Contact:** 610-376-6766 or www.greaterreadingchamber.org

### Wednesday, Oct. 15

**Held by:** Valley Networking  
**Summary:** 401k retirement symposium  
**Where:** Best Western, 300 Gateway Drive, Bethlehem  
**Time:** 9 a.m.-noon or 1-5 p.m.  
**Cost:** Free  
**Contact:** www.valleynetworking.net

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## SUBMITTING ITEMS

Email calendar items two weeks in advance to jenniferg@lvb.com

## BEHIND THE LIST WITH ERIC J. BOYLE, WEALTH MANAGER OF CREST FINANCIAL GROUP

# Trusted investment advice

Effectively managing your money is imperative to quality of life. Whether it be personal or business-related, keeping your finances in check could make or break your chance for success.

Fortunately, throughout the Greater Lehigh Valley there are financial firms to assist in making sure that you're wisely managing your money.

Here to answer this week's "Behind the List" questions is Eric J. Boyle, wealth manager of Crest Financial Group in Allentown.

### Lehigh Valley Business: How long has Crest Financial Group been operating in the Greater Lehigh Valley and what are its primary services?

**Eric J. Boyle:** Our family business has included three generations of advisers dating back to the mid-1970s. We started using the official company name, "Crest Financial Group," in 1998.

The main focus is to provide wealth management services, including retirement and estate planning, college savings, life and long-term care insurance and tax preparation, for families and small-business owners.

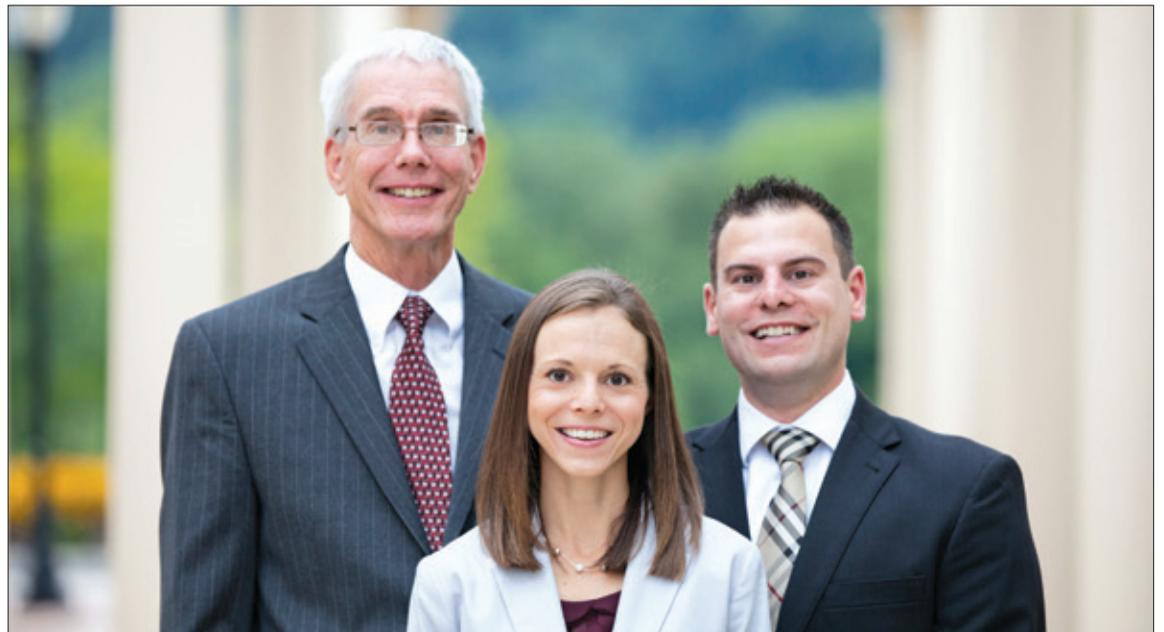
Our credo is in our tagline, "Trusted investment advice from our family to yours."

### LVB: What have been some of the biggest hardships and opportunities that Crest Financial has encountered throughout its years in business?

**Boyle:** One of the biggest opportunities we have as financial advisers is passing our financial knowledge onto our clients through detailed appointments and explanations. It is just as important to understand the individual and their background, as it is their current situation.

We believe the biggest hardship can be described in one word, emotion. The psychology of the business becomes difficult when people are generally reactive in nature, but our planning is proactive.

### LVB: How does Crest Financial



PHOTO/CONTRIBUTED

Crest Financial Group has been a family run business since opening its doors in 1981. Pictured from left are partners Robert K. Springer, Cheryl E. Boyle and Eric J. Boyle.



PHOTO/CHRISTOPHER HOLLAND

Eric J. Boyle, wealth manager at Crest Financial Group in Allentown, provides a multitude of financial services to clients.

### directly stimulate the local economy of the Lehigh Valley?

**Boyle:** The goal of Crest Financial Group is to stimulate the local economy by helping provide families with the financial stability to balance spending locally while obtaining their savings goals. We often say to our disciplined clients, "save 10-15 percent of your income and spend the rest."

We personally spend locally by hosting client events at Coca-Cola Park, PPL Center and Brookside

Country Club. Also, our family has been fortunate enough to sponsor events for nonprofit organizations such as Amyotrophic Lateral Sclerosis (ALS), Habitat for Humanity and the Allentown Rescue Mission.

### LVB: What designations are necessary to become a financial planner?

**Boyle:** At a minimum, a financial adviser must obtain the required securities registrations to be allowed to provide advice or certain invest-

ments to their clients. Beyond this, the Certified Financial Planner designation is the most prestigious.

Co-founder of Crest Financial Group, ... Robert K. Springer, holds both the CFP designation, as well as a Ph.D. in economics.

### LVB: What does the future look like for Crest Financial? Does it have plans for growth?

**Boyle:** Crest Financial Group is always growing. Whether we are accepting referrals from our trusted clients, teaching a retirement and estate planning course in the community, or sponsoring charitable events, there has been steady growth while being able to give back.

With approximately \$200 million of client assets invested, we work with multiple generations of clients and enjoy forming long-lasting relationships with each and every one of their families.

COMPILED BY CHRISTOPHER HOLLAND

## MORE AT LVB.COM

**Video:** Eric Boyle offers advice on seeking a financial adviser.

## LIENS

### BERKS COUNTY

The U. S. Internal Revenue Service filed the following liens in Berks County Courthouse:

**Key Printing Inc.**, 1505 Elizabeth Ave., Reading; 14-181-FT; \$17,742.

**Business Finance Solutions LLC**, 128 W. Broad St., Shillington; 14-182-FT; \$35,182.

**K.O. Towing Service Inc.**, 3058 St. Lawrence Ave., rear, Reading; 14-185-FT; \$2,730.

COMPILED BY TERRY SCOTT REED

### LEHIGH COUNTY

The Internal Revenue Service

filed the following liens in Lehigh County Courthouse:

**Dynamix Dance Center**, 3300 Lehigh St., SPC 518, Allentown, 18103, 2014-169; \$8,290.

**Keystone Educare LLC**, 1101 Hamilton St., Allentown, 18101, 2014-173; \$10,492.

**Joseph Nidoski General Contracting**, 603 Beachwood St., Emmaus, 18049, 2014-175; \$15,291.

**Moving by Cury**, 3933 Maple St., Allentown, 18104, 2014 - 176; \$10,466.

**Discovery Preschool Inc.**, 225 North St., Emmaus, 18049, 2014 - 177; \$13,311.

**Gemini LLC**, 1221 Airport Road, Allentown, 18109, 2014 - 178; \$429.

**JSM Business Services Inc.**, 7660

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