

2024

# YEAR IN REVIEW



LETORT  
TRUST



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*Dear Clients and Friends,*

I would be dishonest if I didn't start this letter by declaring 2024 one of the toughest years I've ever had, both personally and professionally. And I know my brother would say the same. We very unexpectedly lost our business founder and mentor in the same gut punch that took our beloved Dad. But as Dan has so beautifully stated a few times since Marty passed, we wouldn't have such a double-edged loss if we hadn't had the great fortune of working beside our dad for the past 25 years. We are very aware of the rare gift we have had in spending so much time together as family, but it became even more evident to us that every LeTort teammate is family too. We are so very grateful for the way they all stepped up to comfort us following our loss and hold operations together when we were so shattered, all while dealing with their own grief. And we certainly

can't omit our thanks to our clients who rallied around us as well. Marty often said that he was fortunate to build a business where his clients could be his friends, and that they were and are. Marty was a mentor to everyone here and together we all pledge to carry forward in a way that we know would make him proud.

Despite the building being under construction for much of the year, we spent 2024 settling in our new headquarters. As a work 'in office' business, we wanted to create an environment where our team would want to be, and our clients would want to visit. Thanks to our friends at Farinelli Construction, we now have a beautiful new space that is perfectly designed to accommodate our collaborative teamwork for daily operations and for much needed accompanying fun. Our training space has allowed for lots of learning opportunities and fun gatherings for our team and is now ready for selective community use. If you haven't visited yet, we warmly invite you to stop by.

While 2024 was tough, we all worked hard on behalf of our clients while also having lots of fun along the way. Please enjoy some of the updates on the following pages. Thank you again for being part of the LeTort family. We will never take you for granted and we will consistently work to enhance the fiduciary services we will provide for you, your families, your businesses and your employees. Wishing you all a happy, healthy and financially prosperous 2025!

*Katie Clarke*

**President & CEO**

# PROMOTIONS & NEW HIRES

## **PATRICIA LAUCHE** CHIEF FINANCIAL OFFICER

In November 2024, Patricia was promoted to Chief Financial Officer. In her new role, she will oversee financial management, regulatory compliance, and strategic planning for LeTort Trust. Patricia's expertise in strategic tax planning has been invaluable to our clients, and her leadership continues to drive our success.



## **KATRINA DOUGLAS** OPERATIONS SPECIALIST

In November 2024, Katrina was promoted to Operation Specialist. In her new role, Katrina is responsible for providing support for both the Personal Trust department and the Retirement Plan Services department. She also utilizes her prior experience as an administrative assistant in a tax firm to support the LeTort Trust tax team.



## **CHANCE WITMER** CLIENT RELATIONSHIP ADMINISTRATOR

In August 2024, Chance was promoted to Client Relationship Administrator. In his new role, Chance plays a critical role in supporting and enhancing relationships with Personal Trust clients. Key responsibilities include maintaining and updating client records, managing account administration, and preparing financial reports and presentations for client meetings.



## **JENNIFER SENSKY** CLIENT CONCIERGE

In November 2024, Jenn joined LeTort Trust as Client Concierge. In her role, Jenn cultivates and builds relationships with all our clients, coordinates office resources to better manage the client experience and provides other administrative support, as necessary.





# LETORT TRUST FOUNDATION



Photo courtesy of Bethesda Mission

## Bethesda Mission Youth Center Project

Having previously supported phase one of the expansion with an initial donation of \$25,000 in 2016, we were proud to present an additional \$25,000 to support phase two of the expansion. We are thrilled to witness the profound impact the Bethesda Mission has on the youth of our community.



Since we presented the check in February 2024, the old building has been gutted, and the new structure (seen above) has been completed. Work is still ongoing to complete the second floor.

*In 2024, the LeTort Trust Foundation donated over \$92,000 to empower our community. Some of our other recipients include the Joshua Group, Harrisburg University, United Way of the Capital Region, Central PA Food Bank, YWCA of Greater Harrisburg, STEAM Academy and Asheville, NC Foodbank.*



The team proudly presented their annual donation in support of Pennsylvania Free Enterprise Week. Since becoming a PFEW partner, the Foundation has provided scholarships giving more than 320 students the opportunity to attend the week long business experience. Katie has served on the Board of Directors for many years and this summer had the chance to be a Stockholder Presentation Judge during one of the sessions.



The LeTort Trust team proudly presented their annual donation to Junior Achievement of South Central PA, an organization dedicated to empowering young people with the financial skills and knowledge they need to be successful after high school. Allisha Proper serves on the Board of Directors.

# IN THE COMMUNITY



County Commissioners and the Harrisburg Regional Chamber & CREDC selected a delegation of business, education and nonprofit leaders from central Pennsylvania to go to Washington, D.C. Katie Clarke was honored to be selected to take part in collaborative discussions with White House officials on driving innovation and growth in our region.

## Greg Campbell Participates in Dame Leadership Evolution Project 2024



The Leadership Evolution Project Class is a program offered by Dame Leadership designed to help develop emerging leaders. The program focuses on emerging leaders in the early stages of their career journey, communications development, peer learning, executive coaching and networking opportunities.



Katie has been a board member of the Capital Region Economic Development Corporation (CREDC) since 2018 and had the distinct honor of serving as Board Chair for the 2024 Year. CREDC is the Economic Development arm of the Harrisburg Regional Chamber with work focused on business and workforce attraction and retention, financing business growth, and fostering entrepreneurial opportunity.



The LeTort Trust team gathered school and health supplies for the United Way's "Stuff the Bus Event," to help participating schools prepare children for kindergarten.



Patricia Lauchle, a recent Leadership Harrisburg Area (LHA) graduate and member of the Joshua Group Anniversary Gala Committee, helped rally the LeTort team, in collaboration with LHA, to collect winter coats and socks for students and families supported by the Joshua Group in Harrisburg.



The LeTort Team partnered with AAA Cares Backpack Program to help fill 1500 backpacks for local school districts in need.

# COLLABORATIVE TEAM FUN

Amidst all the hard work and dedication, our team found moments to unwind and connect through shared laughter and fun. These activities not only brought smiles, but also strengthened our bonds, reminding us that collaboration thrives when we balance productivity with a little fun. Here's a look at some of the highlights that made our workdays and work year a little brighter!



The team embraced the green spirit this St. Patrick's day with a contest for best dressed. There were two clear winners!



The LeTort team had a fun afternoon to kick-off March Madness filled with games, food and of course, basketball.



The team turned their heads towards the sky for a once-in-a-lifetime event with a solar eclipse watch party.



October brought more excitement, food and fun with the first Fall Festival. Several team members even tried their hand at a fun arts-and-craft activity of pumpkin painting.



Closing out 2024, the team gathered for a fun evening in celebration of the holiday season for a presentation of "A Christmas Carol" at Open Stage. Following the show, we presented a donation in honor of the 25th Anniversary and Nicolas Hughes' final performance.



The first-ever LeCornhole summer invitational/winter final crowned the first champions. Heading into the finale, Robin and Allen took the lead over Patricia and Tya, wrapping up a fun championship.

# IN MEMORY



This year we were all deeply saddened by the unexpected passing of Marty Eichelberger, founder of LeTort Trust. Marty was more than a visionary leader, he was a cherished presence whose warmth, generosity, and wisdom touched everyone he met.

To honor his legacy and to provide a permanent reflection area, a group of Marty's close friends came together to dedicate a beautiful hand-crafted wooden bench and flowering dogwood tree. Their generosity and love has been a true testament to Marty and Susan, whose memory will forever inspire the work we do and the lives we touch.

