

Oh, the Places You'll Go!



Lucy Brown BA
Office Manager

Lucy is the Officer Manager of 18 Asset Management. She has more than 20 years of experience in the industry.

Lucy oversees all client services and financial administration. Lucy is responsible for preparing the firm's annual budget and monitoring its progress. Lucy administers payroll and does the bookkeeping for the firm. She is responsible for bank and asset reconciliations. Lucy collaborates with the team in the preparation and production of client reports and marketing materials.

Prior to 18 AM, Lucy worked at Highstreet Asset Management as a client services administrator and was responsible for client reception, client services and other administrative duties.

18 Asset Management (18 AM) had the pleasure of being a sponsor of the 31st Annual Conference for The Association of Treasurers of Religious Institutes (ATRI) in the fall of 2018. The conference theme was Oh, the Places You'll Go! We decided to incorporate the theme into our complimentary sponsorship gift by purchasing copies of the Dr. Seuss book "Oh, the Places You'll Go!" With our creative juices flowing, we numbered and labelled each book with the title: Oh, the places this book can go. Through the message on the label, we requested the owner email us to let us know which book number they received and its current location. Our label also encouraged recipients to read the book, enjoy it and if inclined, share the book by giving it to someone they felt would benefit from the book's message. We were curious to see:

- how far the books would travel
- the places they would end up
- the impact on recipients
- the feedback we would receive

The books created quite a buzz at the conference. Conference attendees were very appreciative and eager to participate.

To date, we have had emails from several people and are pleased to discover that the books have travelled worldwide. We are thrilled to report that there are books in France, the UK, Zimbabwe, Taiwan, USA and across Canada from coast to coast.

We would like to share a story, particularly, the travels of Book #178. An attendee from the Maritimes sent the book to a relative in Europe. Shortly before Christmas, 18 AM received a note from the book's new owner stating, "A timely gift arrived just in time for me to share it with my 2 boys. It was just perfect as my 5-year old son has just gone into remission after 3 and a half years of daily chemotherapy fighting blood cancer! Let's just say the book was very appropriate. Such a wonderful idea!! I hope many people can be inspired by my son's story. I hope the other books travel for miles and touch many hearts like it has our family. Many thanks."

As the books travel, our wish is that we have brightened the lives of all those who receive our complimentary book Oh, the Places You'll Go!

18 Asset Management is a boutique investment firm who aligns with our clients by effectively managing their money through custom built portfolios that reflect their values. Our firm has a talented team of investment professionals who truly believe that we can make the world a better place.