



This fall, HB Strategies will hold our annual firmwide retreat at the beautiful [Big Cedar Lodge](#) in the heart of the Ozark Mountains, from September 2nd to 5th. This special event is an important investment by the firm to bring together our team members from across the country to collaborate, learn, and strengthen relationships - ensuring we are all positioned for our continued success.

We will be sharing updates and information leading up to the event, so please take time to read through each one as they will have details on transportation, schedule, programming, and much more.

Today, we are asking for your feedback in our annual survey, sharing an invitation to those of you who haven't attended a retreat, and a special note for golfers.

We look forward to seeing everyone in the fall and appreciate your active participation in preparing for the event.

Thank you,


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Your voice matters. To ensure we're supporting both your personal growth and our collective success, we'd like to know what's important to you. Please take a few minutes to complete this anonymous survey and let us know your thoughts and suggestions.

Click [here](#) to access the 2025 survey.

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We know preparing for a big event can feel overwhelming, especially since nearly 30 new team members have joined the firm since our last in-person gathering in Alabama two years ago. To help everyone feel ready and informed, we're organizing virtual small group sessions ahead of this year's retreat. These sessions will cover what to expect, how to prepare, and answer any questions you might have. Keep an eye out for a message from [Rob Marchant](#) and [Tom Alexander](#), who will be leading these discussions this summer.

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Are you interested in playing a round at one of the nation's top golf destinations? Payne's Valley Golf Course—named Golf Digest's Best New Public Course in America in 2021 and designed through a collaboration between Johnny Morris, Tiger Woods, and the Payne Stewart Family—offers a truly unforgettable experience. The first 16 team members to email [Courtney Ellis](#) will secure a spot to play; please note that each golfer will be personally responsible for the \$400 green fee.

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