

PURPOSE-DRIVEN

HARRISON FINANCIAL SERVICES EXISTS TO SERVE OTHERS

The purpose statement for Harrison Financial Services, "Helping families build a better life, legacy, and community," extends beyond its clientele by tying into the company's long tradition of giving back to the community.

WHEN FOUNDER AND CEO Tim Harrison says, "We exist at Harrison Financial Services to serve others," he's not just talking about the services offered to HFS clients like financial planning, wealth management, risk management solutions, investment strategies, retirement planning and business planning. He's also talking about what HFS does on a larger scale, too: supporting the community through a variety of charitable contributions and activities.

"Serving others is part of being purpose-driven, which is one of our core values. In this world where many people are really struggling, we want to do our part in helping others," he said, adding that he and his team members consider assisting others to be a privilege. "We're fortunate to be in a position to 'get to' give back."

Childhood cancer is the primary charitable cause for Northwestern Mutual, and HFS has embraced the cause both through independently coordinated events and activities that are part of the larger Northwestern Mutual effort. As a result, HFS has supported numerous cancer charities including Alex's Lemonade Stand Foundation, Sammy's Superheroes, and the Leukemia & Lymphoma Society.

Employees are also encouraged to "invest in their passion," Harrison said. HFS engages and supports its employees in a variety of giving activities for many causes, from granting time off for board or committee service and other volunteerism to direct financial support to hosting fundraisers in which employees can participate.

"Everybody can find something they want to impact," Harrison said. "And it's fostered a stronger culture in our company. We believe gratitude is part of the key to happiness, and when you can share this belief with others, magical things happen. It is contagious, and I want this experience for everyone."

Harrison also believes that company leadership should set an example. In addition to participating in fundraisers and contributing to causes throughout the year, he and his wife, Traci, co-hosted the Salvation Army William Booth Society's local reception last summer. The Harrisons have also awarded a full-tuition scholarship for 10 years to a working student studying finance or accounting at the University of Nebraska Omaha.

"I think back to the time when Traci and I were both struggling, with not enough time and financial and career pressure, and I still believe college was one of the most high-pressure, difficult times in my life as far as what I had to juggle," Harrison said. "We both had people help us through that period of time in our journey, so we want to pay it forward." They're pleased to be seeing "scholarship recipients giving back as well, paying it forward themselves."

HFS is proud to guide clients in their charitable giving, too, Harrison said, and both he and Director of Financial Planning JoAnne Reynolds carry a CAP (Chartered Advisor in Philanthropy) designation. "We help them get better educated about the needs of the community so they can match up what they feel strongly about to what the community needs," he explained, adding that the company will also make donations in honor of clients for their birthdays, a practice that has been very well-received.

"Helping others feel and catch the gift of gratitude, it's viral in a good way," Harrison said. "You get the multiplier effect, a waterfall for good."

Generosity has been good for not only the individual team members, but also for business.

"Our giving is more powerful than ever," Harrison said. "Maybe it's a coincidence, but despite investing more time and money into our community, our business has never been stronger and our team has never been more aligned."

Having been raised in a family that valued supporting the community ("I grew up watching my parents serve others in a lot of ways, and I grew up feeling and thinking it was important."), Harrison was determined when he started the company 25 years ago to create a corporate environment that cultivates giving. In addition to advising seven foundation clients, HFS helps guide younger employees into becoming the next generation of givers and even provides opportunities for children and families of all HFS employees to get involved. Almost anyone can contribute something to the community, he said.

"People think, 'I don't have time, I don't have money to give.' You have to start somewhere, so pick one person or one organization to help and take a step forward," he said. "Giving and serving is its own reward."

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~ TIM HARRISON
Founder and CEO

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*~ TIM HARRISON
Founder and CEO*

**SEATED: JOANNE REYNOLDS, TIM HARRISON, SETH TRACY
STANDING: MICHAEL HERRMANN, JACK MCKEEGAN, ALEX WING, CIERRA CUMMINS, MAREN STONE,
ABDUL SAFI, MELISSA THOMPSON, BRANDON KRANTZ, DAN MCCOY, JOHN GIBB, KATE TERHAAR**