



## Opening and Closing Remarks | Odlum Brown's 29<sup>th</sup> Annual Address

By Debra Doucette, President and Chief Executive Officer

Good evening, everyone. It's so awesome to see live people in this auditorium. It's so great to see – actually see – you all. My name is Debi Doucette and I am the President and CEO of Odlum Brown, and it is truly my pleasure to welcome you all this evening. Even though we've come together virtually the last couple of years, there's nothing quite like being in person, so it truly, truly is wonderful to see you.

And not only am I very happy to be back in person to see you all, but it couldn't come at a better time because this year marks Odlum Brown's 100<sup>th</sup> anniversary. All I can say is thank goodness we weren't founded in 1921 or 1922, or this party would have looked very different!

Last month, we kicked off our 100<sup>th</sup> anniversary internally with a special event for our team members. We chose the date January 9 – 1.9.23. – to mark the year of our founding, in 1923.

But tonight, we are launching our 100<sup>th</sup> *outside* of our walls with all of you. Now, when you turn 100, you don't just celebrate once, you celebrate all year long, so this is really just the beginning. I am really, really happy that you all can be a part of it.

As you might imagine, our firm has a rich history. It's a great story and one that we are all very, very proud of. We have invited a very special friend of our firm to tell you our story via video. I'm pleased to introduce *Investing for Generations: The Odlum Brown Story* narrated by the Founding Artistic Director of Bard on the Beach Shakespeare Festival, Christopher Gaze.

### Video: "Investing for Generations: The Odlum Brown Story"

I have to tell you that video was produced entirely in house by our Marketing and Communications team, and I thought they did a fabulous job. Christopher Gaze couldn't join us today, but I want to express my appreciation for his generosity in lending that magnificent voice to our story. Bard on the Beach is a longstanding community partner of ours, and it's very special for him to celebrate this way with us.

That video is also a little bittersweet to watch for me. Our colleague of over 50 years and my very good friend Tony Hepburn is featured in that video. Tony passed away this summer, and he is very much missed by all of us. He and I spoke many, many times about this 100<sup>th</sup> anniversary, and I know he is very much in our hearts as we celebrate today.

I'm guessing by now you are sensing a storytelling theme this evening. As part of our 100<sup>th</sup> celebrations, we have been gathering stories from our clients about how working with Odlum Brown has impacted their lives. You will have seen some on the screen when you walked in, but there's one I wanted to read out loud that really meant a lot to me. I think it really speaks to the truly challenging few years that we've all had, and also to the commitment of the entire Odlum Brown team to continue putting our clients first. So, here it is – and, don't worry, I have permission to share:

*I was vacationing when the pandemic hit the news. Watching for hours every evening and worrying about what was happening 'out there,' watching the value of my investments plummet, I panicked and called my Odlum Brown*

*advisor. He was also on vacation but was, as always, available to speak to me. He gave me the confidence I needed to just sit tight, not make any radical moves. And as always, he was right. It has been a tumultuous couple of years, but I have even more confidence in Odlum Brown to handle my financial future.*

I have to say that I am so proud of my colleagues and of this firm. That feeling that we were able to give this client, and to so many others, when they were scared – *that* is why Odlum Brown has been around for 100 years.

What we do is so much more than helping you invest. It's guidance. It's expertise. It's someone whose interests are aligned with yours. It's someone to trust and count on.

And that trust and those relationships – with many of you here today – are what has enabled Odlum Brown to reach this extraordinary milestone. We simply could not have done it without you.

Now, a lot changes over 100 years, and we are in a very different world than we were 100 years ago, or even when I joined the firm in 1991.

Over the holidays, I was at home with my kids, and one of them showed me an online tool called ChatGPT. As you all know, there's an app for everything these days, and this tool can actually simulate human conversation or even write something based on a prompt. So I had an idea, and I asked it to "write a poem about a 100<sup>th</sup> anniversary." Here is what it came up with:

A century has passed  
Since the day it all began  
A hundred years of memories  
Of laughter, love, and joy  
A hundred years of growth  
Of learning and of change  
A hundred years of trials  
And triumphs, big and small  
A hundred years of legacy  
That will live on and on

Pretty good. Actually, not too bad. But when you look at it a second time, it's actually pretty superficial. It's good – for a robot. But it's not so good when you compare it to what someone could write who really knows this firm and what this anniversary means to all of us.

Technology these days makes a lot of things "easy." There's so much you can do on your own. But, as with this poem, what gets lost? What isn't *quite* as good as it could be? I would argue – a lot.

There's a lot to be said for that personal connection. To have someone in your corner who's been through it. To reach a real person, someone who knows you, on the other end of that phone or that email. Especially when you're feeling uneasy about things, like that client we heard from earlier. *This* is what our advisors and our team members do so well.

Now, this doesn't mean that *how* we do our business doesn't change because it changes all the time. We are always adapting to shifts in our industry, technology and in the economic and political landscape. The truth is, if we weren't well equipped to respond to change, then we wouldn't have made it even halfway to 100.

But it's *what* we do – the expertise we provide, the relationships we build, our dedication to helping you to achieve your financial goals – *that* will never change.

So thank you again for your trust, and for helping us to celebrate 100 years of Odlum Brown.

Now I'm going to turn matters over to my colleague Murray Leith, who I know is just as excited to see you all in person as well.

### **[Transcript: "A Clue to a Brighter Future" by Murray Leith](#)**

Thank you, Murray. So before we move into the reception, I wanted to let you know there will be cake – because it is a birthday party.

As you leave the auditorium, you're also going to receive a special cookie. Now this cookie is actually a little more than just a sweet treat, and I want you to think about this cookie as old school meets new school.

So the "old school" is the cookie. The "new school" is the QR code that's on the cookie. The QR code actually works, and if you use it – before you eat it, of course – it will take you to a [special anniversary page](#) on our website. On this page, we invite you to share a story about our firm, if you haven't already. We're going to be using these stories throughout the year, so we would really love to hear some more if you have them.

It's also going to link to another exciting 100<sup>th</sup> anniversary initiative we are launching tonight. As you heard in the video you saw earlier, community involvement is a really big part of who we are and what we do at Odlum Brown. And for our 100<sup>th</sup> anniversary, we want to make an even bigger impact.

We're really proud of the organizations we already partner with, but we know there are many wonderful organizations out there that we don't know about – yet. And that's where you and the QR code come in.

I'd like you to use it to link to our website, where you can nominate a charitable organization that is important to you to become one of Odlum Brown's new community partners.

After reading all of the submissions, we're going to pick four, and we will be giving those organizations a \$5,000 donation from our firm. I would really encourage you to use the code, and eat the cookie, and [submit some recommendations for us](#).

So – I think I have kept you from the cake long enough! Please join us, stay a while, share some stories and speak to any one of us here. Thank you so much for coming this evening and being part of our 100<sup>th</sup> anniversary celebration.