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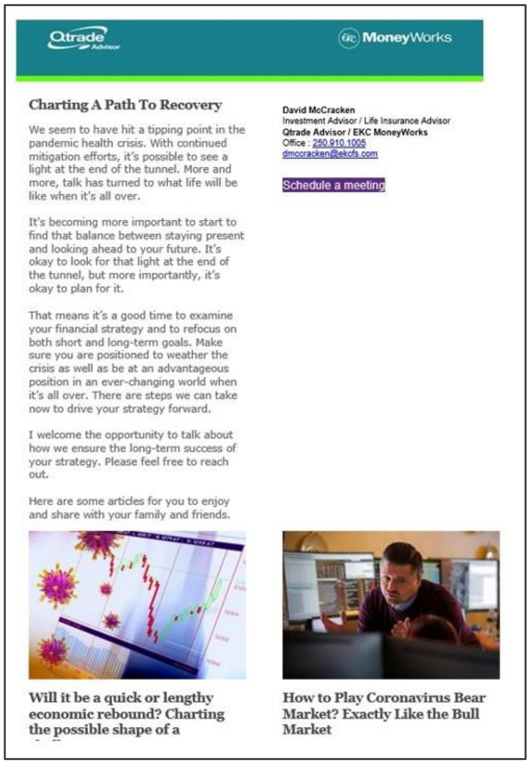

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Charting A Path To Recovery

We seem to have hit a tipping point in the pandemic health crisis. With continued mitigation efforts, it's possible to see a light at the end of the tunnel. More and more, talk has turned to what life will be like when it's all over.

It's becoming more important to start to find that balance between staying present and looking ahead to your future. It's okay to look for that light at the end of the tunnel, but more importantly, it's okay to plan for it.

That means it's a good time to examine your financial strategy and to refocus on both short and long-term goals. Make sure you are positioned to weather the crisis as well as be at an advantageous position in an ever-changing world when it's all over. There are steps we can take now to drive your strategy forward.

I welcome the opportunity to talk about how we ensure the long-term success of your strategy. Please feel free to reach out.

Here are some articles for you to enjoy and share with your family and friends.

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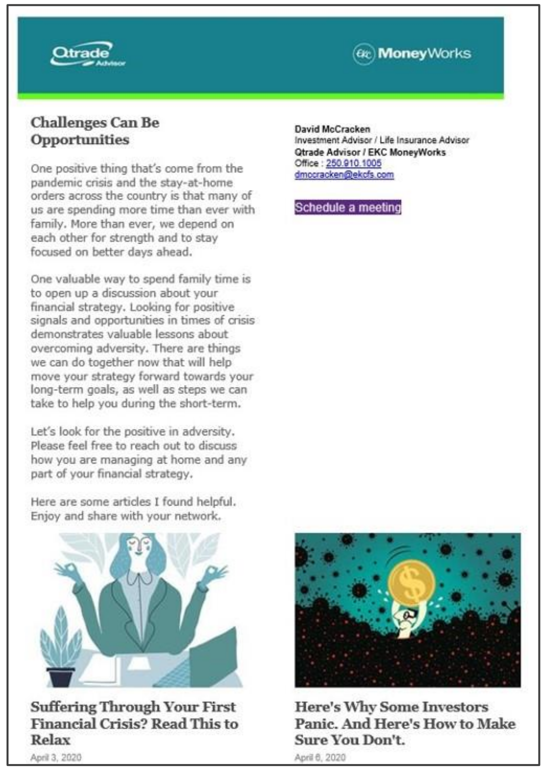
Schedule a meeting

Will it be a quick or lengthy economic rebound? Charting the possible shape of a

How to Play Coronavirus Bear Market? Exactly Like the Bull Market



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Challenges Can Be Opportunities

One positive thing that's come from the pandemic crisis and the stay-at-home orders across the country is that many of us are spending more time than ever with family. More than ever, we depend on each other for strength and to stay focused on better days ahead.

One valuable way to spend family time is to open up a discussion about your financial strategy. Looking for positive signals and opportunities in times of crisis demonstrates valuable lessons about overcoming adversity. There are things we can do together now that will help move your strategy forward towards your long-term goals, as well as steps we can take to help you during the short-term.

Let's look for the positive in adversity. Please feel free to reach out to discuss how you are managing at home and any part of your financial strategy.

Here are some articles I found helpful. Enjoy and share with your network.

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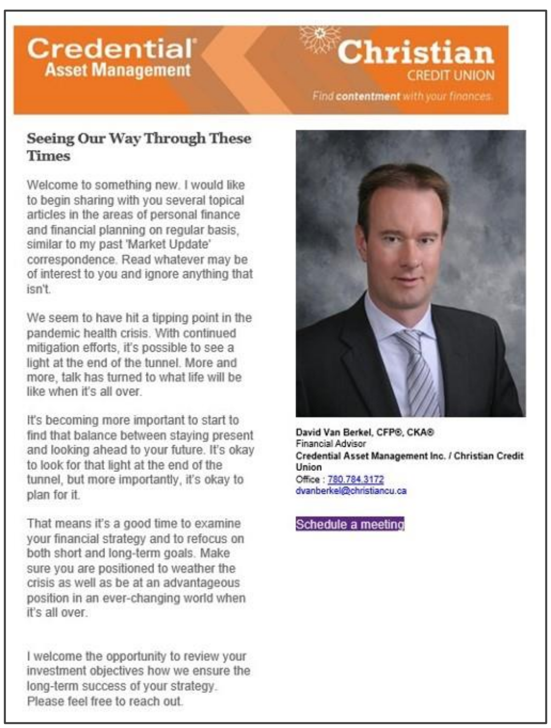
Suffering Through Your First Financial Crisis? Read This to Relax
April 3, 2020

Here's Why Some Investors Panic. And Here's How to Make Sure You Don't.
April 6, 2020



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Seeing Our Way Through These Times

Welcome to something new. I would like to begin sharing with you several topical articles in the areas of personal finance and financial planning on regular basis, similar to my past 'Market Update' correspondence. Read whatever may be of interest to you and ignore anything that isn't.

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I welcome the opportunity to review your investment objectives how we ensure the long-term success of your strategy. Please feel free to reach out.

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