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Milestone Birthdays

MAY

5/4 - Lori B.
5/7 - Jeremy B.
5/7 - Charles A.
5/19 - Richard M.
5/22 - Rich T.
5/27 - Sharon D.
5/27 - Anthony M.

JUNE

6/1 - Terry T.
6/5 - Myra E.
6/7 - Travis L.
6/7 - Kaleen K.
6/7 - Julie E.
6/10 - Charles F.
6/27 - Marisa B.

JULY

7/3 - Marlene M.
7/4 - Lynette M.
7/7 - Russell B.

Upcoming Events

5/20 - Conference Call
6/17 - Conference Call
7/15 - Conference Call

Conference Call Dial-In Information

Every 3rd Wednesday of the month, we host a conference call from 1:00-1:30 PM where speakers provide a market update. DIAL IN: (712)775-7031 Access Code: 595-247# REPLAY: (712)775-7029 Access Code: 595-247#

WEAVER

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YOUR LIFE ✈️ YOUR LEGACY

In the past 105 years, the stock market has experienced 14 "waterfall" corrections: a sharp decline in equity prices over a 2 month period. The Covid-19 correction is my 5th waterfall correction in 23 years as an advisor. As I get older, I tend to remember only the most significant events in my life. And, I can honestly say, I remember each and every one of these past corrections. I thought the 2008-2009 would be the toughest that I would go through, but this past couple of months have been the hardest on me. As I reflect, I believe it is for a few specific reasons:

1) The lack of clarity and answers as the US economy has never been locked down because of a disease. 2) The violent pace and emotions this brings with it 3) the tragic economic and health loss for so many people. About a year after the great recession ended, I got very sick. The emotional effects caught up to me. Being aware of this, I am doing my best to protect myself from repeating the past. Although I dread going through these, I am grateful for the wisdom and conscious changes that come from them.

- Jason ✈️



YOUR LIFE — I will always remember 2020 for two things: 1) As the year I became pregnant with my first child and 2) the year we had Covid-19. Those are two very big things to remember the start of a new decade by! By the time you're reading this, I am currently 5 months pregnant, and I have been so grateful to not only enjoy a wonderful pregnancy, but also to have a clear mind while we have all endured our experience with Covid-19. This is the first time in my career where I have seen people worried about their health and their money at the same time. March was a period where we saw the market drop 32% in 3 weeks. The steepest decline we've ever experienced. Weeks were spent on the phones, watching the markets and

listening to every piece of news out there. Weekends were spent in the office looking at data and building strategies with the team. At points we would joke that it felt like we were on the front lines of war. Albert Camus argued in his book "The Plague," that "pandemics reveal the true colors of human nature" and I couldn't agree more. As the chaos has finally started to settle, it has allowed me points of reflection. The biggest being, how do you show up for the people in your life when times are challenging? How do you show up for a family member that's afraid? How do you show up for a client who is worried? How do you show up for your team at work? How do you show up for a friend that's feeling lonely? I think the beauty of this time hasn't only been connecting but to actually create the space to show up for the people around you. Because when chaos strikes, isn't that what we will all remember? Who were the people that showed up for us, and how did they help us stay connected? - Jessica ✈️







To our recently retired clients:
Henry M., Hazel S., Paul P., Gary C.
Stay young at heart, kind in spirit,
and enjoy retirement living.
Congratulations!

YOUR LEGACY – As I shelter in place, I’ve been spending some time contemplating this historic change we have all been forced to cope with. Unwanted change is the hardest to manage, but we know from history that change is unavoidable. In the midst of this transition, I find myself reflecting on how I’m handling it. Depending on your situation, the valleys can be very deep. The deeper they are, the darker they can be and harder to get out of. Additionally, everyone is going through these significant life changes all at the same time. I know a single mom now out of work, a cancer patient who can’t get the support she needs, nieces and nephews who will miss out on prom and graduation, and weddings that are being cancelled/postponed...my own included. Everyone is experiencing their own valleys, their own stress. This “collective anxiety” can weigh even more heavily on us if we are listening to negative news day in and day out. If we look closely enough, however, we can see glimmers of light. Hope starts to emerge and helps us move forward. When we receive helping hands from loved ones, gratitude enters... and we start climbing out

of the valleys with our own acts of service toward others as well. We start to appreciate everyone who shows up and appreciate the experiences we took for granted in the past. We adapt and climb out of our valleys with these incremental but meaningful peaks as we go. We are adapting and moving forward with the hope of seeing another peak, the next one more remarkable than the last. I see all these valleys and peaks adding up to something bigger and better for all of us. If I were to ask you 1 year ago, “Do you think the world needs more gratitude, more appreciation, and more compassion?”, I would guess your answer would be “Yes.” I now ask you: Are you starting to feel more gratitude, more appreciation, and more compassion in your own world? I can definitely say I am. - Travis



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