

Contents

Milestone Birthdays
Conference Call
Info
Intro
Your Life
Recent Retirements
Upcoming Events
Your Legacy

Milestone Birthdays

AUGUST

8/3 - Carrie I.
8/6 - Kai K.
8/9 - Bruce W.
8/10 - Leylanie P.
8/15 - Dennis C.

SEPTEMBER

8/6 - Linda J.
9/12 - Mark A.
9/13 - Nate B.
9/14 - Mary R.
9/15 - Rafael H.
9/23 - Ann V.
9/25 - Kyle M.
9/28 - Mike B.
9/29 - Rhonda B.
9/30 - Sheryl C.

OCTOBER

10/4 - Christine M.
10/9 - Caroline L.
10/10 - Mike L.
10/20 - Angela R.
10/22 - Mary F.
10/29 - John B.

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

— CONSULTING GROUP —

YOUR LIFE YOUR LEGACY

The first step in getting the life you want is to get rid of the things that don't benefit you. The dictionary describes clutter as a collection of "things" lying about in an untidy mess. However, clutter and disorganization can affect every aspect of your existence. It gets in the way of people achieving their personal goals as they deal with piles of unread mail, unread books, clothes that have never been worn, and the latest technological gadget. Too much clutter can affect a person's anxiety level, ability to sleep, and to focus. It can also

make individuals less productive as they sit and look at the latest Netflix series rather than dealing with the chaos that they have surrounded themselves with. Helping people take care of the clutter in their life

is a big business in the 21st century. There are books, self-help classes, and TED talks about how to declutter. Those seemingly harmless cupboards that are bursting at the seams with "stuff" and piles of papers on your desk that are not dealt with have a cumulative effect on a person's brain and their ability to focus. Remember! Less stuff means less stuff to clean, less to organize, less to store, less mess. Identify the essential and eliminate the rest!

- Andrew 




To our recently retired clients,
Toan D., Cliff W., Gloria and Lorenzo

Enjoy your new found freedom and make the most of it. Happy retirement.
Congratulations!

YOUR LIFE — In 2000, we bought our first home in Costa Mesa and got married in the same year. At the time, we had mostly essential items, so we welcomed all of the housewarming and wedding gifts from friends and family. In 2001, when Colin was born, we started our collection of baby needs. In 2003, we added all sorts of girl items with Haley's arrival. As we expanded our family with dogs and cats, we bought friendly items to keep them occupied. By the time we moved in 2012, we accumulated enough to require a full team of movers and family to settle us into our new home.

Although moving forced us to consider what to take with us, we quickly filled the extra space with newer and bigger items. Throughout the years we de-cluttered by donating to charity and renting bins, but it wasn't until we recently painted and re-carpeted our house

that we really got rid of stuff. I personally used the opportunity to purge anything I hadn't used for six months or didn't even know that I still had. Not only did cleaning clear up space in our house, it also granted clarity and appreciation for how much I have been given in life. There are all sorts of articles on why decluttering is good and how to best clean out your home, but ultimately getting rid of unnecessary items is about organizing your life. You are taking control of an important aspect, which will allow you to simplify the often overwhelming world around you and be more productive. It's just like working out; by cleaning you are making a good, healthy decision that will likely encourage you to make good choices and improve the overall quality of life.

- Jason 

Upcoming Events

8/18 - Monthly Conference Call
9/15 - Monthly Conference Call
10/20 - Monthly Conference Call



YOUR LEGACY — When someone mentions “declutter” our minds often go to cleaning out our closet, reorganizing the pantry or rearranging an overwhelming weekly calendar. But have you thought about decluttering accounts? Maybe you have an old retirement that has just been sitting, or an old 401(k) that you never touched when leaving a job. In some cases, leaving everything separated is fine. But there could be benefits to taking a look at your overall portfolio and consolidating.

Easier to Manage

When you have multiple accounts open (especially at different firms), it can be confusing to keep track of where everything is. Condensing accounts into one place helps declutter. By having one log in, one statement each month, and one place to call it can be easier to stay organized. If you have to update personal information or make changes to your goals, it could save time my not needing to call multiple places.

Don't Miss Required Distributions

Once you reach age 70 1/2 to 72 , RMDs must be taken out of retirement accounts each year. People are notified of the amount each





year, but if there are multiple accounts at various firms it can be confusing to keep track. Having everything at one place helps ensure nothing is missed.

Organizing Your Legacy

Combining accounts can be helpful in the event of someone's passing. Rather than having to track down numerous accounts, loved ones can call one place, lessening the work load during an already stressful time.

- Kaylyn ✨



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