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Milestone Birthdays

AUGUST

8/4 - Joey F.
8/7 - Martin P.
8/12 - Stuart S.
8/18 - Roger C.
8/28 - Arlene W.
8/29 - Betty Sue D.
8/31 - Robin S.

SEPTEMBER

9/4 - Julia M.
9/7 - Craig W.
9/9 - Lori B.
9/10 - Danielle D.
9/21 - Kimberly C.
9/23 - Alex G.
9/25 - Mark H.

OCTOBER

10/2 - Rich R.
10/15 - Jimmy G.
10/15 - Rosemary R.
10/23 - Maria H.
10/31 - Mike D.

YOUR LIFE ✨ YOUR LEGACY

As I am writing this, our family is traveling to Kauai on our annual summer vacation. I look forward to this trip every year. We discovered Kauai in 2016 and have collectively chosen this as our favorite family destination. The island offers each of us things we like to do: snorkeling, surfing, hiking and just laying at the beach or pool. We call it our paradise and have so many memories of intimate times we have spent together. Every year, we find ourselves creating a checklist and marking off all the activities we have to hit before we leave. It is funny how we love doing the same things and enjoying the same restaurants. One of our favorites is Beach House, which overlooks the ocean. Colin and I love to boogie board. Shannon and Haley love to snorkel and shop. We know our kids will both be off to college this year and Shannon and I are taking inventory before they leave in a couple of weeks. We are also very aware that as they transition into their own lives and become even more independent, we will cherish our time together and look forward to continuing this summer ritual for years to come. - Jason ✨



YOUR LIFE — Growing up, I enjoyed our family trips, but one to Hawaii stood out more than most. As a kid, the fact that you get to show up, spend time with your more-relaxed-than-usual family, and partake in exciting new activities was a dream. Now, with a 1-year-old, a “successful family trip” has different ingredients. Aiden’s ingredients include us and maybe a pool. We just want everything to go smoothly and create the experience we planned and envisioned. I’m fortunate that my wife likes planning, finding where we will be staying, arranging activities, and making sure we are properly packed and ready. Hats off to her since I know this is no easy job, especially with international travel. If the roles were reversed, we might come back with pictures of Aiden in the same outfit every day and a sunburned scalp. We’ve had two trips with him on a plane, and he did good...while we did OK. I think the stress of not knowing if his ears were popping and our worst fears of having a screaming baby the whole flight made things tense. We were overly eager to get to our destination. The pool and an umbrella drink for mom and dad were our only needs. “It’s not the destination, it’s the journey”... is a phrase I like to believe in, but it’s definitely harder to adhere to with a 1-year-old. Next on our agenda are long weekend trips and destinations close to home. Surprisingly, a pool and an umbrella drink can be found without taking a plane. This makes sense for us now. I’m sure we will be back to plane travel eventually, maybe when he can remember it and we can enjoy the journey again. - Travis ✨



To our recently retired clients,
Mike O., Nancy U., Shannon N.

Whatever comes next for you,
may it bring you happiness and fulfillment.
Congratulations!

UPCOMING EVENTS

8/17 - Monthly Conference Call
9/21 - Monthly Conference Call
10/19 - Monthly Conference Call
10/20 - Client Wine Tasting Event

YOUR LEGACY – Whether you do it with family, or friends you’ve chosen as family, vacationing together is rewarding. Not only are you building lifelong memories, vacations also break you away from your usual routine, open your mind, and give new perspectives. Growing up, my parents always took us camping. My brothers and I love to reminisce on who made the biggest fire, who make the perfect s’more (me) and who could set up their tent the fastest. These trips are where I learned to love traveling in big groups. The dynamic of having different personalities is so fun, and splitting travel costs is a bonus. As an adult, camping is still one of my favorite things to do. Although my family doesn’t travel together anymore, I’m surrounded by friends who love to. Sometimes we plan the next trip before we’ve even left the one we’re on. They were at my engagement in Banff, Alberta and wedding in New Canaan, CT. Together, we backpacked over 45 miles across Catalina. We’ve spent hours keeping ourselves entertained on the long drive to Mammoth for ski trips. I constantly remind myself how grateful I am to be surrounded with such adventurous people. I truly cherish these trips, as I know they won’t last forever. I look forward to creating these memories with a family of my own one day. - Kaylyn 🏔️



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Every 3rd Wednesday of the month, we host a conference call from 1:00-1:30 PM where speakers provide a market update.

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