

Year-end news: Celebrating life and growth

A lot has happened since our last newsletter. From a business perspective, we navigated a dynamic market environment marked by both challenges and opportunities. While news events and the election cycle created volatility, our clients' portfolios demonstrated resilience. This reinforces the crucial importance of adhering to your long-term financial plan and maintaining a consistent investment approach aligned with your strategic goals.

Our team is committed to developing personalized plans that address your unique financial circumstances. We remain confident in our ability to guide you towards achieving your financial aspirations.

We value the strong relationships we build with our clients throughout the year and enjoy celebrating your family milestones. This newsletter gives us the chance to share our own exciting team updates with you.

Rafa turns one

Earlier in the year we introduced you to Lee's grandson Rafael who is turning one in January. Not only has he captured his family's heart this year, but we think he has found his true calling. Here's the future denizen of the courts on Halloween with his coaches (parents).



Exciting Feldman family news

Stephanie's family kept busy as always! In July they adopted Babar, a beautiful and playful Labradoodle, and her daughter Ivy learned how to drive. Take a deep breath Stephanie!



An inspirational row

Jennifer recently had the opportunity to participate in The Head of the Charles River, the largest regatta in the world over three days in Boston, MA. 828 teams, 74 events, 2,625 boats/entries. This year HOCR highlighted the Survivor Rowing Network exhibition race where 11 boats competed. Jen explained, “We had 20 athletes competing in Boston for the first time. It was inspiring to row against the best athletes in the world.”



Travels and gold for Shauna's family

Shauna and her friends got to explore Maine this Summer, working her way up the coast to Bar Harbor and ending their journey in Portland. She also got to celebrate daughter Nora's "Golden Birthday" where she turned eight



Thank you for your trust

We are incredibly grateful for the continued trust our clients place in us. The steady stream of referrals from satisfied clients is a testament to the value we provide. We are proud to serve multi-generational families and assist them in navigating complex estate planning matters to ensure their legacies are fulfilled.

We encourage you to continue sharing your stories with us. We value the relationships we have built and are committed to helping you and your families achieve your financial goals and live your best lives.

Here's to a Happy and Healthy New Year.

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