

September 7, 2018



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Get A September Fresh Start

Hello,

Even as adults, September and the back-to-school season represents a fresh start. Not necessarily new binders, pencil crayons, and textbooks, but a fresh look at our routine at work, at home, and ideally our long-term financial goals.

This September also marks the continuation of one of the longest bull markets in history and an economy that is booming. With the market reaching new heights, you might be wondering if you should be making changes to your financial plan.

This makes it an ideal time to re-evaluate your long-term goals and take a look at your investments to make sure they are still working to help you get where you want to go. September is also National Preparedness month, time to make sure you are prepared to protect your family and your possessions in case of emergencies.

Let's meet to look at your portfolio to make sure you are well-positioned to take advantage of the current economic conditions, and that you have the protections you need in place.

Please feel free to share these articles with your family and friends – they are excellent conversation starters.



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