



Simplified 360°

Hello there!

Spring is in the air! As the weather begins to warm up and the days get longer, it's a great time to take a fresh look at your financial plans and goals.

Now is a great time to:

- Review your portfolio.
- Update your financial plan.
- Re-evaluate your risk tolerance.
- Update your beneficiaries.
- Review annual goals.

These simple steps can help you make sure that all of your investments are aligned with your goals, and working for you. Don't let this spring cleaning opportunity pass you by! Let's work together to make sure your wealth is working just as hard as you do.

Spotlight



Your 20's are an interesting time. You can be surrounded by friends and some are in school, some are having kids, some are working entry-level jobs, and some are doctors. While no one in their 20s is facing identical situations, there are some universal needs. We compiled a list of what to do (financially) in your 20s.

What to do in your 20s.

Articles



Instilling Financial Values in Your Family

The shift in multigenerational wealth represents a huge opportunity for future

generations. To ensure a smooth transition of wealth, it is important to consider the values you wish to impart that can help prepare heirs to manage their wealth and inheritance responsibly while carrying on your family's financial legacy.

Consider these steps to instill your financial principles in your family.

[Read the Article](#)

Simply Social

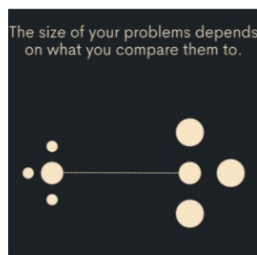


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