

Your Financial Journey

Helping You Make Better Financial Decisions

Volume 21

Market Update for the Quarter Ending March 31, 2021

Presented by Timothy P. Shean, CFP®, Chief Financial Officer

Please visit our [website](#) for the latest Market Update from Commonwealth Financial Network®—the broker/dealer that supports us in helping you manage your financial life. As always, if you'd like to discuss this—or anything regarding current market conditions or your portfolio—please feel free to contact us at any time.

Understanding the American Rescue Plan Act of 2021

Presented by Steven E. Richardson, CFP®, CRPS®, President

On March 11, 2021, President Biden signed the American Rescue Plan Act of 2021 ("the Act") into law, with large portions of the bill acting as an economic stimulus for individuals and businesses affected by the COVID-19 pandemic. At \$1.9 trillion in total expenditures, the bill contains provisions pertaining to a variety of areas. This summary is intended to address only the critical provisions for individuals and small businesses. [Read on...](#)



Ryan "Sully" Sullivan Passes CFP® Exam

Congratulations to Sully, who passed the CERTIFIED FINANCIAL PLANNER® Exam. The exam is a significant milestone towards earning the CFP® certification, which is recognized industry-wide as the standard of excellence for education, experience, and personal ethics and responsibility in financial planning. Sully joined our firm in July of 2019 after graduating from Virginia Tech with a B.S. in Finance.

World Capital Market performance and a timeline of events for the first quarter of 2021:

[DFA 2021 Q1 Market Review](#)



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