Your Financial Journey

Helping You Make Better Financial Decisions

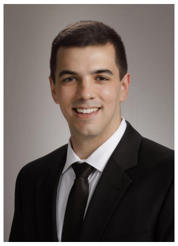
Volume 25

A Guide to Benefits When Changing Jobs

Presented by Ryan Kellinger, CFP®, Advisor

If you're changing jobs, you probably have a lot on your mind. As you wrap up work with your previous employer and prepare for your new role, it can be easy to let important benefits-related decisions fall by the wayside. If that happens, you could miss a limited opportunity to sign up for new benefits or miss out on making wise changes to your plans. To stay on track financially during a career transition, be sure to review the status of your retirement accounts and other valuable employee benefits. Read on...

Staff News



Please join us in congratulating Kyle on his recent promotion to Financial Planning Associate. In addition to earning his CFP® designation, Kyle has completed his FINRA securities licensing exams (Series 7 and 66) as well as his Life & Health exam, an important milestone on his way to becoming an advisor. In his new role, Kyle will become more deeply involved in the financial planning and investment management process, working closely with our senior advisors. Kyle's dedication, professionalism, and commitment will serve him well in this new position. Congrats Kyle and thank you for all you do!

DFA Quarterly Market Review - 1st Q 2022

The Q1 2022 Market Review by Dimensional Funds Investors is now available on our website:

DFA Q1 2022

Beyond the Numbers Webinar

Presented by Brad McMillan, CIO of Commonwealth Financial Network

Please join us to hear directly from the expert whose insights we rely on to help guide our investment recommendations for you. Nationally recognized for his in-depth knowledge of the financial markets and economic issues, Brad's views are often sought by *Bloomberg News*, *Wall Street Journal*, *Barron's,* and other national and international business news outlets.

During this webinar, Brad will offer his observations on recent market challenges and emerging opportunities that may affect your financial perspective, including:

- The economy is still growing.
- The war poses risks, but so far, the economic and market impact has been small – as expected
- The biggest challenge ahead will be inflation and high-interest rates, but right now prospects are still positive.

April 28, 2022 4 PM- 4:30 PM ET

Register

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