POTOMAC FINANCIAL
PRIVATE CLIENT GROUP, LLC

Your Financial Journey

Helping You Make Better Financial Decisions

Arjun Khadka Joins the Potomac Financial Team

We are thrilled to introduce you to our newest team member, Arjun Khadka. Arjun began his career in finance in 2001 and most recently served as an Annuity Sales Consultant with Cuna Mutual Brokerage Services. Arjun will be supporting our advisors and their clients, putting his love of customer service at the forefront. When he is not spending time with his family, Arjun is an avid cricket player who travels nationally with his team. We are excited to see him play and to learn more about the sport!

Please join us in welcoming Arjun to the team! Click here to read his full bio.

PFPCG Teambuilding Day

We recently enjoyed a Teambuilding Day in the District of Columbia which included an adventurous Segway Tour of the monuments (no injuries reported), a fantastic lunch, and an off-the-beaten path historical tour filled with stories that did not make it into the history books. We were lucky enough to have perfect weather for our tours, which is unusual for this summer! It was rejuvenating for all to take a day out of our busy schedules to get out of the office, connect personally and just have some fun. Thank you for your understanding and support of this important "time-out"!

Spotlight: Charitable Giving

It's not to early to plan your charitable giving for the year-end, especially if you make Qualified Charitable Distributions (QCDs) from your Retirement Account(s). QCDs often require paperwork, signatures, and a little extra processing time, so we do encourage you to plan and act now, rather than waiting for the year-end crunch. To help you consider your charitable giving options, check out this article, Charitable Giving: What to Do Before You Donate.

Microsoft Teams

We have changed our virtual meeting platform from Zoom to **Teams** for both client meetings and webinars. To join a **Teams** meeting or webinar just select "**Click here to join the meeting**" or the link provided. Questions? Click below or give us a call.

Teams How-Tos

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Connect with us
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