



Client market update

June 12, 2020

Client

For over 40 years, we've been helping our clients weather global recessions. Our industry expertise has enabled us to develop effective, long-term strategies for success. Cornerstones of our holistic financial planning process include:

- Diversified investment strategies
- Detailed analysis of third-party investment firms
- Ongoing monitoring and regular rebalancing of your portfolio

As always, we're closely following the economic and market shifts that have accompanied the recent global health crisis. We understand that market declines may be disconcerting, but they are normal and temporary occurrences. To that end, we are cautiously optimistic about the near-term future as markets start to rebound.

However, we still expect economic volatility over the next 12 months. Bearing in mind historic fiscal trends, current events, and the upcoming presidential election (among many other complex factors), we anticipate additional downturns ahead. Yet, we encourage you to focus on long-term goals rather than daily stock prices.

We are here for you during the ups *and* downs, and are eagerly following the latest market trends and fiscal policy changes that may affect you and your portfolio. With preparation, planning, and patience, we can anticipate the new (post-Covid) norm and adapt to ensure your long-term legacy remains in tact.

Please do not hesitate to contact us with any questions or concerns.

Kind regards,

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* This information is not intended to be a substitute for specific individualized tax advice. We suggest that you discuss your specific tax issues with a qualified tax professional.