

GOOD LIFE NEWSLETTER

GOOD LIFE TRACKER

Q1

Q2

Q3

Q4

Feeling unsure about the markets? It's a great time to check in and ensure your investments are aligned with your goals for the new year. We can review your progress, address any concerns, and make adjustments to keep you on track. [Schedule a meeting with us today!](#)



MARGIE'S MOTIVATION

"The new year is a blank page, a fresh start, a chance to write a new story. Make it your best one yet."

WHAT'S NEW ON YOUTUBE ANTHONY'S THURSDAY THOUGHTS

[Power Points: Political Power & Market Performance](#)

[Power Points: Tax Planning Tips for Year-End Savings](#)

[Watch More!](#)



Check out Anthony's article of the month: [The 50 Best Places to Travel in 2025](#)

JEFF'S LIFE LESSON:

Timeless Life Lessons to Carry Into the New Year



Looking for some inspiration to carry into the new year? In his latest blog, Jeff shares timeless life lessons from the 'School of Hard Knocks'—insights on kindness, letting go, and choosing your own path. Check it out below to read Jeff's thoughtful reflections and start 2025 with a fresh perspective!

[Read Here](#)

Keep reading to see our team holiday letter below!



ERIN'S EVENT COLUMN



RMDs Made Simple: A Guide to Retirement Withdrawals

JAN 15 12pm

[Register](#)

State of the Markets Webinar

FEB 25 12pm

Let's Connect!



steinfinancialgroup.com

Happy Holidays!

from Stein Financial Group

Jeff

As we approach the end of 2024, I find myself reflecting on the journey this year has taken us on—both personally and as part of the Stein Financial Group family. It's been a year of travel, projects, challenges, and triumphs, and through it all, the connections we share with you have still been at the heart of what we do.

On a personal note, Jeanne and I were fortunate to enjoy some wonderful trips this year. We spent a delightful 10 days in Scottsdale, Arizona, during a cooler-than-usual spring (we didn't mind a bit!). In May, we visited Savannah, Georgia, Charleston, South Carolina, and Hilton Head, where we were spoiled by great food, warm hospitality, and the beauty of the ocean.

Like any homeowner, our year included a few projects—our roof was replaced, and we tackled some much-needed painting both inside and out. Our house, approaching its 50th birthday, keeps us busy, but we're grateful for the talented tradespeople who made everything look great.

In June, Jeanne faced a health challenge, but thanks to excellent care and her strength, we are thrilled to share that she's doing well and growing stronger every day. I was also lucky to spend time golfing with friends this summer, a cherished tradition that reminds me of the simple joys in life.

At the office, we've had an exciting development—after months of searching, we're thrilled to welcome a new associate to our team! We'll share more details soon, but this is just one of the many reasons 2024 has been a year to celebrate.

Thanks to you—our valued clients—and our dedicated team (Anthony, Margie, Erin, and Jen), Stein Financial Group has had a fantastic year. Many of you joined us for educational events, and we connected with most of you in person, over the phone, or via video. Your partnership means the world to us and makes our work truly fulfilling.

One highlight of the year was our movie event at The Heights Theater. Seeing families—grandparents, children, and grandchildren—enjoying costumes, trick-or-treat bags, and the movie *Hocus Pocus* was such a joy. It's moments like these that build the sense of community we cherish.

Looking ahead, we're planning new educational workshops and fun events alongside the programs you've told us mean the most to you. Erin is already brimming with creative ideas to make 2025 engaging, enjoyable, and full of opportunities to connect. Margie continues to make us look great while making it seem easy, Jen handles the day-to-day administration like a pro, and the Amazing Anthony proves being smart and caring is a great combination for creating solutions that work, and providing peace of mind because of the process and his communication skills. What a great group.

From my family and the incredible team at Stein Financial Group, we wish you a 2025 filled with health, happiness, and prosperity. Thank you for being part of our journey—we are so grateful to walk this path with you.

Warmest regards,
Jeff

Anthony

Emily and I have the silliest, sweetest, and most opinionated little girl I have ever met, and we had very little room for just about anything else in 2024. Reflecting back on last year, it was a year full of firsts for our daughter Matilda. Her first steps, her first trip to the zoo, her first seasonal obsession (pumpkins), and her first favorite color (green, St. Patrick's day will be a big one for her). And there is still so much more to do and discover. She still hasn't figured out why we ordered her a new dresser, why her old crib has been moved into the room next door, and she certainly has very little idea how her small world is going to get just a little bit bigger in January when we welcome her brother or sister to our family. It will be a great new adventure for all three of us. I hope your 2025 is filled with just as many surprises as Matilda's. Thank you for being a part of our 2024 and beyond.



Margie

2024 was an exciting year both professionally and personally. As Stein Financial Group, we have a book club where we read and discuss business related titles. We are currently reading *How to Know a Person: The Art of Seeing Others Deeply and Being Deeply Seen* by David Brooks. I am finding this book fascinating. It has given me ideas to be a better communicator, but even more important a better listener. I try to incorporate many of these ideas at work and at home. I love seeing clients when they come into the office or talking to them on the phone. On a personal level, I was fortunate to add another grandson this year. I now have 3 grandsons and one granddaughter. I see them often and they bring me great joy. In my spare time I love to read or listen to audiobooks. I am so looking forward to seeing what 2025 has in store for all of us.

Erin

With 2024 coming to a close, it's been another year of fun experiences and special memories! Weekdays were filled with morning calls with the SFG team, planning our monthly events, and working to connect with and support our clients. Hosting events like our golf gathering and *Hocus Pocus* movie afternoon are always highlights, and I enjoy the opportunity to connect with more of our clients in such fun settings! Most of my weekends were jam-packed with time spent with family & friends, concerts, MN sports games, weddings, photography, road trips to visit friends, and travels around the US. With my free time, I made sure to carve out moments for relaxing with a good book, trying new recipes, taking barre classes, getting out on the golf course, and enjoying time by the lake! Cheers to another year of memories and growth - wishing you and your loved ones all the best in the new year!

