

# GOOD LIFE NEWSLETTER

## GOOD LIFE TRACKER

Q1

Q2

Q3

Q4

Another reminder to schedule your annual review before the year wraps up! These meetings are a great opportunity to review your progress, make any necessary adjustments, and set a strong foundation for the year ahead. December slots are filling quickly, so be sure to secure your preferred time. [Schedule here!](#)



## MARGIE'S MOTIVATION

*"Limitations live only in our minds. But if we use our imaginations, our possibilities become limitless."*

- Jamie Paolinetti

## ANTHONY'S THURSDAY THOUGHTS

[Ex-Spouse Social Security Benefits: What You Need to Know](#)

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

[Watch More!](#)



**Check out Anthony's article of the month:** [Warren Buffett suggests all parents do one thing before they die, whether they have 'modest or staggering wealth'](#)

## JEFF'S LIFE LESSON:

### **Gratitude, Connection, and Community: The Heart of the Holiday Season**



This Thanksgiving, we reflect on the importance of gratitude, connection, and community—values that lie at the heart of everything we do at Stein Financial Group. As we move into the holiday season, we invite you to join us in embracing the spirit of giving and supporting one another for a brighter future. Read more of Jeff's new blog below!

[Read Here](#)

## PHOTO OF THE MONTH



Our team had the privilege of volunteering at Second Harvest Heartland last month. Together, we helped pack an incredible 5,015 meals to support families in our community!

## ERIN'S EVENT COLUMN



### **2025 Kick-Off: Your Complete Checklist for the New Year**

DEC 4 12pm

[Register](#)

### **RMD Webinar**

JAN 15 12pm

### **State of the Markets Webinar**

FEB 25 12pm

**Let's Connect!**



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