

GOOD LIFE NEWSLETTER

GOOD LIFE TRACKER

Q1

Q2

Q3

Q4

We're happy to be offering our Tax Analysis Service again this year! Share with us your 2023 tax return and we'll look for areas of opportunity, review your accounts for their tax advantages, and discuss how to integrate them into your overall tax planning strategy. Reach out to us if you're interested.



MARGIE'S MOTIVATION

"The pessimist complains about the wind; the optimist expects it to change; the realist adjusts the sails."

- William Arthur Ward

ANTHONY'S THURSDAY THOUGHTS

[3 Ways to Spring-Clean Your Finances](#)

[How Our Tax Analysis Service Can Transform Your Finances](#)

[Watch More!](#)



Check out Anthony's article of the month: [How the world got into \\$315 trillion of debt](#)

JEFF'S LIFE LESSON:

Turning Fear into Fuel



In his new blog post, Jeff reflects on personal experiences and explores how confronting and understanding our fears, especially regarding finances, can transform uncertainty into confidence and pave the way for a successful future. Click below to read more!

[Read Here](#)

ERIN'S EVENT COLUMN



Anthony's Virtual Office Hours

JUN 5 1pm

[Join](#)

Getting Long-Term Care Planning Right: Smart Approaches for People at All Stages

JUN 25 12pm

[Register](#)

Mid-Year Market Webinar

JULY

College Planning Webinar

AUGUST

Let's Connect!



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