

# SUMMER 2021 NEWSLETTER



Happy Summer!

With Massachusetts finally reopened, we are eagerly looking forward to seeing several of you in person again at our BBQ cookout on Friday, August 6th! The menu for the event is looking delicious with pulled pork sliders, potato salad, fruit salad, and more. We hope to see you there; however, if you're unable to make it, let us know if you'd like the surprise goodie we'll be handing out at the cookout (hint: we'll need your size!).

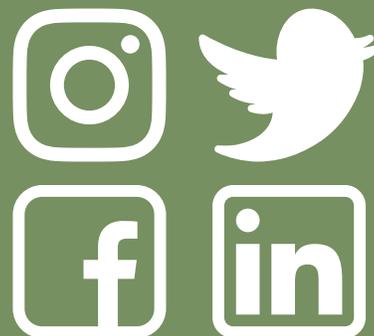
With the pandemic absorbing the past year and a half of our lives, it's great to see things going back to normal! Many of us have already returned to the workplace, back to school season is right around the corner... we're now adjusting to our old normal!

We hope that with the pandemic coming to an end, you and your family are able to return to doing the things you love: going to Red Sox games, traveling, seeing family, and more. If you ever need anything, please reach out.

- David & Ashley

WE RECENTLY JOINED  
INSTAGRAM & TWITTER!

Click on the icons on the right to stay  
connected with us on social media.





# COMMUNITY

## DAVID AND ASHLEY PRESENT AT COMMONWEALTH FINANCIAL NETWORK WOMEN ADVISORS SUMMIT

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What an exciting summer!

In June, David and Ashley presented at the Summit for Women Advisors, a Commonwealth Financial Network event that aims to inspire the advancement of women in our field.

During their live discussion titled "Financial Services Sisterhood: How to Bring More Women into Our Industry," David and Ashley shed light on how we can bring more women into the financial advising industry.

The two shared several steps that we can take to attract more women to our field discussed several questions, including:

- How do we encourage more women to enter the field?
- What are tangible actions we can take to bring more diversity to our industry?
- How can we ensure that advisors who can relate to women clients and understand their needs are available to help guide their financial decisions?

Check out our social media handles to see more about their discussion!

## ASHLEY FEATURED IN VALIANT WOMEN OF COMMONWEALTH SERIES

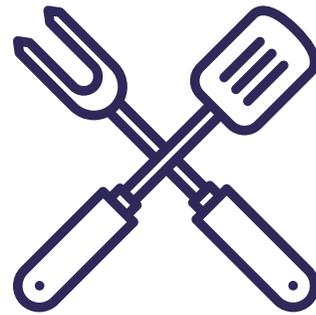
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The Commonwealth Financial Network® recently featured Ashley in their [Valiant Women of Commonwealth](#) interview series!

During the interview, Ashley detailed her transition from interning at Vantage Point Financial during college to working full-time post-graduation: first as a client services manager and shortly thereafter as a firm partner.

The Valiant Women of Commonwealth series aligns very well with Vantage Point Financial's own objectives by aiming to uplift women in the financial services industry and highlight their achievements. During her interview, Ashley was able to touch on the goals of Vantage Point Financial, including the firm's commitment to gender parity, clients' education, and independent financial advice.

# UPCOMING EVENT



## AUGUST 6

What: BBQ Cookout  
Where: Vantage Point  
Financial Pool Patio  
When: 11 AM to 2 PM  
RSVP: by August 2

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For more information or to  
RSVP, please email Olivia  
([oliviadeval@vantagepointfinancial.com](mailto:oliviadeval@vantagepointfinancial.com))

We are always looking  
for client appreciation  
event ideas!

If you have an idea,  
whether in-person or  
virtual, please feel free  
to share it with us!

## INTERESTED IN WHAT FORMER VANTAGE POINT FINANCIAL INTERNS ARE UP TO?

Introducing our new "Where Are  
They Now?" series!  
This summer, we're featuring  
former interns on social media to  
share updates on their careers  
since interning at Vantage Point  
Financial.

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Click on the icons below  
to connect with us on  
social media and follow  
the series.





## WHAT'S NEW...

### INTERESTED IN MOVING INTO AN ESG PORTFOLIO?

David and Ashley continue to make ESG funds a larger part of their practice. If investing in socially responsible companies interests you and you would like to move into an ESG portfolio, please contact the office, and we'd be happy to help.

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We are thrilled to have Olivia Deval join the Vantage Point Financial team! Feel free to reach out to Olivia any time at [oliviadeval@vantagepointfinancial.com](mailto:oliviadeval@vantagepointfinancial.com) or by calling the office.

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### IN THE MARKET

During the quarter ending June 30th, 2021:

- Equity markets rallied, capping off a positive quarter for U.S. indices. The S&P 500 gained 8.55%, the Nasdaq rose by 9.68%, and the Dow Jones Industrial Average gained 5.08%.
- International markets also saw solid results. The MSCI EAFE Index returned 5.17% and the MSCI Emerging Markets Index saw a 5.12% gain.
- Even fixed income had a strong second quarter, as declining long-term interest rates helped support fixed income markets. The 10-year U.S. Treasury yield ended at 1.45% while the Bloomberg Barclays U.S. Aggregate Bond Index gained 1.83%. High-yield fixed-income also saw gains with Bloomberg Barclays U.S. Corporate High Yield Bond Index increasing by 2.74%.
- Although the pandemic continues as an ongoing medical risk, the worst appears to be behind us from an economic and market perspective. We made steady progress in containing the spread of the coronavirus, with continued vaccine progress driving much of the improvement.
- As we close out the first half of the year, the big risk remains the introduction of more contagious versions of the virus, notably the Delta variant. As that spreads, especially in areas with lower vaccination rates, there is the potential for medical risks to rise in the future, but for the time being, they remain largely contained.