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The Long View Is Best for Your Investments

We know that market fluctuations can be distracting. Fortunately, we also know that taking the long view is a prudent approach to investing. We're making a change to help you focus on your financial future and tune out the noise.

If you receive paper statements in the mail today, beginning this summer, you'll receive quarterly statements only*. This change is automatic, so you don't need to take any action. If you'd like to continue receiving monthly paper statements, please let me know and I'll keep your preference set to monthly delivery.

Eight fewer paper statements each year means less clutter in your home and increased security of your information. With less of your personal information in the mail and trash, you are better protected.

If you'd like to reduce mailings further, you can sign up for Account View, our secure client portal, and select the paperless option. In Account View, you can view all of your statements and additional up-to-date account details when it's convenient for you, 24/7.

Simply follow the prompts on the sign-up page. The guide Account View: The Access Point for Investors can help answer your questions. Or simply call us and we can help walk you through setting up your profile.

If you've already opted for paperless in Account View, you're all set! Your experience will not change and there's nothing for you to do.

Staying Connected

Your account statements are a useful tool in our continuing conversation about your financial future. Please don't hesitate to contact me if you have any questions or want to discuss your investments.

Sincerely,



Michael Edmondson, CFP®
President
Capital and Planning

**Beginning with the July monthly statement (available in August), paper monthly statements will no longer be automatically mailed. You will receive the third-quarter 2023 statement in the mail, and only quarterly mailed statements thereafter, unless you request monthly statements, choose to go 100% paperless, or have certain investments that require statements be sent by mail.*

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