

Weekly Note

Happy Friday and happy Fourth of July Weekend too!!

I am sure I sound like a broken record, but another year is flying by!! How did half of the year pass already? All I know is it goes too fast, that is for sure!!

For me, the first half of the year has been eventful in many ways, some good and some bad. I have lost a few friends and a long-time client so far this year, and that hurts for sure. We have welcomed some new additions to client families as well, which is always special. Personally, I feel that I have been making good progress on many of my 2024 New Year Resolutions, although I am finding it hard to slow down.

Professionally, I believe we have made some great progress here with our new firm; we have been re-establishing our meeting and contact schedules in addition to reviewing and incorporating many of the new solutions available to us through our affiliation with Raymond James. We have begun to roll out our new tax strategy evaluator, and it has already proven to be very useful! And of course, I have been busy rebalancing many of our client's portfolios to take advantage of the strong stock market as well as some cool new products that offer potential returns that are not stock market related. It has been quite exhilarating to find these new solutions and incorporate them into our clients' portfolios.

It feels great to be pro-active with such solutions at a time when there is so much angst in the nation and the world, especially as we get closer and closer to the elections in November. For me, the strength of the stock market in the face of what we are all likely feeling every day reinforces my now 4-year-old theory that the stock market itself is increasingly less reflective of the overall economy. One can argue that the economy is doing great or doing poorly depending on your perspective, but we cannot ignore the gains the stock market has provided steadily since the beginning of November. To that end, we wanted to share with you in this note some great pieces that the Hartford Mutual Fund Company provided to us earlier this week. They are attached for your review, and I would encourage all of you to read through the one titled "10 Things You Should Know About Politics and Investing."

In addition, we wanted to share with you a more basic report that provides performance of many different investments for the first half of the year. It is titled "Weekly Market Flash" and is prepared by Raymond James itself. I review this every Monday when I assess performance of my investment models, but since this one encapsulated the first six months of the year I wanted to share with you today.

Last, I did want to share with you a couple of important notes about our practice. First, Kate and I have decided that we are going to take it a bit slower for the month of July and likely most of August in terms of meetings. We want to take some time to reflect on how our first several months as Accompany Wealth Partners have progressed and consider how best to improve our services to you going forward. We are working with some internal partners at Raymond James to help us with this assessment, as we want to continue to provide you with the thoughtful, unique, and personal service that each of you expect and deserve. We think the summer months are the best time for self-reflection, so this will likely become an annual standard.

Second, we have decided to change the frequency of these notes from bi-weekly (which has been my goal) to monthly. We think this will give us more time to make these notes more meaningful and

comprehensive to include thoughtful and timely insights about all things financial. Hope that is OK with you! As we all know by now investment performance is certainly important, but there are many other financial variables that are very important to our clients' financial success!!

Ok, that is it for this Friday! Hope everyone has a great weekend!!

Chris and Kate

Any opinions are those of Accompany Wealth Partners and not necessarily those of Raymond James. Expressions of opinion are as of this date and are subject to change without notice. There is no guarantee that these statements, opinions, or forecasts provided herein will prove to be correct. The information contained in this report does not purport to be a complete description of the securities, markets, or developments referred to in this material. The foregoing information has been obtained from sources considered to be reliable, but we do not guarantee that it is accurate or complete, it is not a statement of all available data necessary for making an investment decision, and it does not constitute a recommendation. Past performance is not a guarantee of future results. Investing involves risk and you may incur a profit or loss regardless of strategy selected, including asset allocation and diversification.

Chris Goles, MBA

Founding Partner,
Accompany Wealth Partners
Branch Manager & Financial Advisor, RJFS

Kate DeHart, CLTC®

Founding Partner,
Accompany Wealth Partners
Financial Advisor, RJFS



11350 McCormick Road,
Executive Plaza III, Suite 508,
Hunt Valley, MD 21031

Direct: 410.698.4819
Office: 410.989.5922
Toll Free: 888.405.5360
Fax: 410.989.6416