



# CWA Connection

Josh Colwell

## What is CoWealth?

### *Our Mission*

Welcome to the 1st edition of the CoWealth Advisors quarterly newsletter.

When we started CoWealth Advisors in September of 2022, it was with the goal to be a professional place where you could receive the highest level of service, financial advice, and personal relationships that you could find within our industry or anywhere else.

So many of you over the years have rewarded us with the opportunity to be an extension of your family and to participate in the happenings of your lives. Our hope is this newsletter will allow us to bring a greater sense of community to those of you we serve.

In the months and years ahead, our goal will be to not only keep you abreast of pertinent financial topics and helpful information, but to also share milestones, successes and even family recipes that we hope will become a bright spot in your day.

Many of you may not know, but the genesis of the name “CoWealth” stems from our team’s view that we are your personal partners in pursuing your version of wealth. Wealth comes in many forms and has different meanings to many of you that we serve, but a common thread for most of you is that wealth represents freedom and the ability to spend more of your time and resources with the people you love. Whatever your version of wealth may be, we are here to help you pursue it, achieve it, and enjoy it.

Thank you for being the best part of CoWealth Advisors, we appreciate getting to be a part of your family and for the opportunity to have you as a part of ours.

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## July:

02	Jeanenne
05	Elizabeth
05	Janet
07	Karen
09	Ellen
10	David
10	Rishi
14	Stephen
15	Brannen
17	Shannon
18	Brian
19	Mary
23	Joy
26	Maggie
30	Erin



## August:

01	Noelle
03	Connie
03	Stacey
03	Frank
03	Frank
04	Maria
08	Andy
09	Stephen
09	Paige
11	Caroline
11	Kay
15	Donna
17	Bridget
18	Joe
18	Elizabeth
20	Melissa
20	Abigail
23	Dan
25	Rebecca
26	Bashir

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## We Are Growing!

### *Adding a New Location*

Please welcome the newest members of the CoWealth Advisors Family!

To honor our commitment of serving all of you at our highest capability, we are so fortunate to be adding three incredible new members to our team.

Ron Burdekin, Amy Burdekin, and Mandy Beam are joining us as members of our new Peachtree City location.

Ron has been serving clients as a Financial Advisor for nearly 25 years; not only is he a Certified Financial Planner, but he is also a Certified Public Accountant and brings a wealth of investment experience with him.

Ron joins CoWealth Advisors to become our lead Investment Strategist, as well as the Head of the CoWealth Advisors Investment Committee.

Ron's wife, Amy, and Client Service Associate, Mandy Beam, will partner with our team to continue serving their existing clients and ours, as well.

To learn more about Ron, Amy, and Mandy, please visit our website and check out their Bio's.

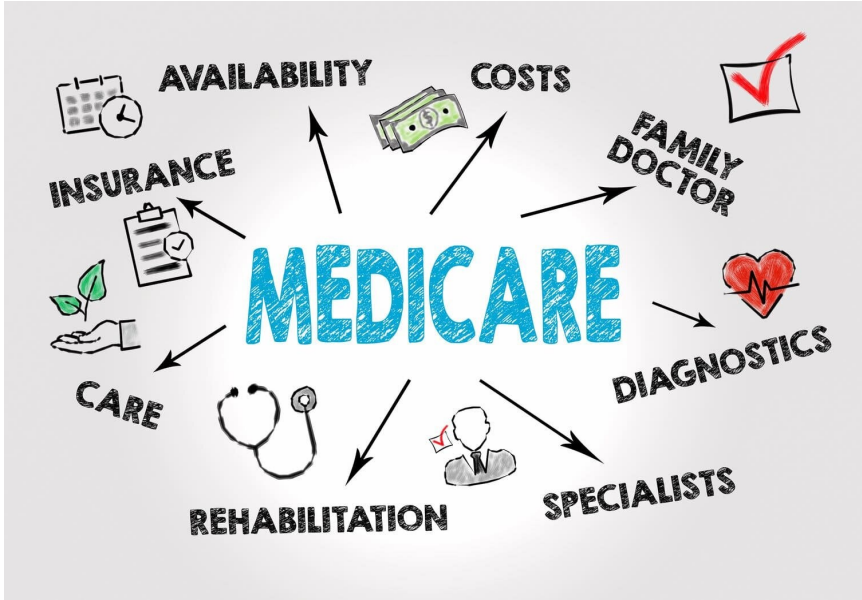


## Books...Books...Books

Bring a book—Swap a book

We are starting a small book swap area in our CWA lobby. You are welcome to bring a gently read book to donate and choose one to take with you.





Raymond James approved  
**Medicare Enrollment**

*The tools and support to simplify Medicare enrollment all in one*

Medicare enrollment can be a complicated, time-consuming process, but with the right tools and information, it doesn't have to be. That's why we're proud to announce that Raymond James has partnered with ClearMatch to remove the guesswork and provide personalized assistance when you are ready to make decisions regarding your Medicare coverage.

ClearMatch provides online education and decision support tools designed specifically for people who are eligible for Medicare and offers plans from all major national and regional carriers.

Through ClearMatch, you will receive personalized service and unbiased advice from a dedicated licensed agent, including:

- Assistance with reviewing healthcare information and evaluating available plans
- Help with purchasing the plan of your choice and completing the enrollment process
- Support for setting up billing and premium payments

There is no cost to use ClearMatch's services, and those services don't end after enrollment. Your licensed agent will continue to provide support throughout the lifetime of your enrollment for coverage questions, appeals and plan renewals.

To learn more about ClearMatch, call the Raymond James number at 844.269.2646.



September:

- 02 Randy
- 04 Doug
- 04 Rob
- 05 Mark
- 07 William
- 09 Pat
- 10 Shelly
- 10 Michael
- 16 Stephanie
- 16 Pamela
- 18 Connie
- 18 Cindy
- 21 Kayte
- 22 Leslie
- 22 Dane
- 23 Brandon
- 23 Siva
- 24 Steve
- 29 Jessica
- 29 Kathryn
- 29 Charles
- 29 Valerie

## Happy Fourth!

Happy Independence Day! Hard to believe our republic, this grand experiment in democracy, turns a healthy 248 years old this July 4. That's a long time removed from July 1776, when the first Independence Day celebration took place in Philadelphia. Back then, our newly independent nation had a population of 2.5 million. Today our estimated population is over 334 million.

Suffice to say, we've grown a lot since 1776. But, through it all, we've held onto the joyful, optimistic spirit that embodies our July Fourth festivities. Since its formal creation in 1941, the Fourth of July holiday has brought our country an opportunity for heartfelt celebration, true comradery, closeness with those we love and a sense of patriotism we can wear proudly.

We have John Adams, our second president, to thank for many of our boisterous Fourth of July traditions. When the Declaration of Independence was approved, he requested we celebrate with



“pomp and parade,” with shows, games, sports, bells, bonfires, and illuminations, from “one end of this continent to the other, from this time forward forevermore.” You don't have to ask us twice, John.

I hope you and your loved ones are able to celebrate freedom and all things American this year, and for many years to come. Thank you for your continued confidence in us. It's an honor to serve you.

## Newnan 4th of July Parade

Thursday, July 4th, 2024 • 9:00 am

The Parade will begin at Veteran's Memorial Park (Temple Avenue Park) and will end at Greenville Street Park.

## Local Markets

### Newnan

*Farmers Market*

Mondays @ 8:30 am – 12:00 pm  
Asa M. Powell, Sr. Expo Center  
197 Temple Ave., Newnan

Since 1977, the market brings local farm families and vendors together to offer their fresh, locally grown produce, flowers, meats, eggs, tasty treats, unique handmade arts and crafts and so much more.

*Market Day*

1st Saturday of the Month  
10:00 am—2:00 pm  
Downtown Newnan

The market showcases a variety of handmade, homemade, and homegrown products created by local artisans, artists, and farmers. It features over 50 unique booths with new vendors and one-of-a-kind items each month.

### Senoia

*Farmers Market*

Saturdays @ 8:30 am - 1:00 pm  
40 Travis St, Senoia, GA 30276

This local market features fresh food vendors, exciting artisans and regional treats. Enjoy a coffee, mimosa or bloody mary while perusing local goods.

### Sharpsburg

*Market Day*

Saturday @ 10:00 am - 2:00 pm  
Town of Sharpsburg - Community Center,  
105 Main Street, Sharpsburg

A fun-filled day of shopping, food, and community vibes. Discover unique treasures from local vendors, indulge in delicious treats, and connect with neighbors and friends. Whether you're looking for handmade crafts, delicious baked goods, or a cup of coffee, the Sharpsburg Market has something for everyone.





## Thank you!

You have our upmost appreciation.

Josh Colwell  
John F. Pulicare  
Stephanie Harris  
Trish Marts  
Ron Burdekin  
Amy Burdekin  
Mandy Beam

CoWealth Advisors  
celebrates its  
2<sup>nd</sup> Anniversary  
September 22, 2024

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