

Have you written your Financial Love Letter?



What is a financial love letter, you might ask?

It's a heartfelt communication that goes beyond the sentiments of affection to encompass crucial financial information and instructions for your loved ones. As uncomfortable as the topic of death can be, it is an inevitable part of life. We can either leave our loved ones to continue without us, scrambling for proper next steps, or we can help prepare them.

Articulating these details in a "Love Letter to My Family", you equip your family with the necessary tools to navigate the complexities of your estate, investments and other financial matters with confidence and clarity. From account details to the location of important documents, every piece of information shared in this letter serves as a guiding light for your loved ones.

A Gift of Love, Security and a Lasting Legacy

A financial love letter enables you to impart invaluable wisdom, values and life lessons to future generations beyond the tangible assets and investments. It serves as a testament to your legacy, a profound expression of financial achievements, love, care, security, and responsibility towards your loved ones. You leave behind a legacy far richer than any material wealth.

To simplify the moments after your death, sit down, take pen to paper, pour your heart into words, leave a legacy of love, wisdom, and security.

Contact us for your Love Letter packet today!

Upcoming Events!

by Tony Lott, Ryan Paschen, and Veronica Pies

“Market Talk” -

A look into the upcoming Presidential Election and it’s potential impact on the Markets

Date: To be determined prior to the election.



Register on our website at www.lottandpartners.com

- "Upcoming Events"

Did you know?

by Veronica L. Pies

Reviewing your statement online regularly is a good habit.

If you have chosen to receive your statements online, it is recommended to review your account information online on a regular basis - at least once a quarter, if not more.

Take a moment today and visit Client Access now!
It’s an easy, secure way to see where you stand.

Benefits of e-delivery

By electing e-delivery, you can:

- Receive a \$25 account fee credit toward certain annual account fees
- Conveniently access your account information any time, any place
- Safeguard your personal information through advanced security measures and 24/7 threat monitoring
- Save paper and reduce carbon emissions
- Keep your own environment clutter-free

Documents offered electronically

- **Statements**
 - With electronic delivery of monthly statements, you automatically receive an online annual summary of activity.
- **Trade confirmation**
- **Tax reports**
 - Tax reports that may be delivered online include: IRS Composite Form (1099-B, DIV, INT, Misc., OID) and IRS Forms 1099-R, 5498, and 1099-Q.
- **Shareholder reports and proxies**
- **Prospectuses**
- **Other correspondence**
 - Other correspondence that may be delivered online include: Disclosure documents (such as ADV disclosures for advisory accounts, the new Regulation Best Interest client disclosure and disclosures for ERISA accounts), confirmations of certain activities (such as international wire transfers or new account profiles that have been established), verifications of information about you and/or your accounts, and other notifications that may be delivered electronically with your consent.
 - ***We strongly recommend you elect e-delivery*** for “Other correspondence” to avoid getting bulky paper mailings of the many regulatory-required ADV disclosure packets that are hundreds of pages, and some are so lengthy they could be sent to you in a cardboard box (pictured).



Please contact our office if you prefer not to be enrolled in Client Access and e-delivery.

Need an appointment?

You can schedule your Portfolio Review, Financial Planning meeting, or even an Administrative meeting with us at anytime just by using our Website below:

www.lottandpartners.com

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