

RAYMOND JAMES®



Peter L. Mendall, CFP®
Kimberley J. Mondoñedo, CFP®
CERTIFIED FINANCIAL PLANNER™

Dear Friends,

Earth Day was a hit from the start. The first one, more than 50 years ago, was observed by a remarkable 20 million people at rallies held across the United States, and it soon spread to become an international celebration of nature every April 22.

There are many ways to participate: planting a tree, collecting recyclables, or simply going for a walk and enjoying the beauty of nature.

Protecting and preserving our planet is a responsibility we all share – and there are more ways than ever to contribute. Companies around the world, including Raymond James, are helping to drive real change with their dedication to sustainable business practices, and investors are voicing their approval.

While it used to be that avoiding objectionable industries was the only way to apply your values in your investment choices, now you can purposely invest in companies whose business models emphasize sustainability. Often referred to as ESG investing for the criteria by which companies are assessed – environmental, social, and governance – sustainable investing can also be an effective portfolio strategy.

We invite you to explore the ways Raymond James is committed to being a good steward and providing [sustainable investment strategies](#), as well as the ways sustainable investing is [making an impact](#) in the world.

We are proud to be affiliated with a firm that believes sustainability goes beyond reducing our resource usage. Building a better world starts with financing strategic initiatives that improve the environmental footprints and community impacts of individuals, organizations, and municipalities.

Happy Earth Day.

We would love to hear from you about how you connect with nature, or to talk about sustainable investing opportunities that help make a difference every day. If you have pictures or messages please pass them along to us, themendallfinancialgroup@raymondjames.com!

Announcements:

- Congratulations are in order for our very own CFP®, Peter Mendall, who recently received his designation as a Certified Exit Planning Advisor (CEPA). The exit planning process helps serve as a means to better prepare clients for the eventual transition out of their business. The CEPA program through the [Exit Planning Institute](#) is the most widely accepted and endorsed exit planning program available, focused around cross-functional consulting and value acceleration. Congrats, Peter!
- *We'd love to hear your input!* Our team strives to provide great communication and outstanding service. However, there is always room for improvement. Please take a moment to give us your feedback, themendallfinancialgroup@raymondjames.com, so we can continue to get better for you.

Sincerely,

Peter L. Mendall, CFP®

Kimberley J. Mondoñedo, CFP®

Mendall Financial Group LLC®

T 207.621.2626 // F 207.621.2727

320 Water Street, 4th Floor, Augusta, ME 04330

www.raymondjames.com/maineretirementcenter

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