

#pax NEWS

PURSUING LIFE **at** PEACE

FALL 2023

VOLUME 041

THOUGHTFUL SERVICE & TAILORED STRATEGIES

Our business was built to serve you. Collectively, we offer decades of experience, which we dedicate to crafting innovative, thoughtful financial strategies for clients. We take the time to get to know your lifestyle, goals and values, so that we can deliver a plan designed to help you strive for the future you've envisioned for yourself and your family. Offering the breadth of resources and capabilities of a large corporation, we provide the tailored, attentive service of a small firm.

Never jump in a pile of leaves with a wet sucker.
- Linus, It's the Great Pumpkin, Charlie Brown

Market Outlook

[Click Here](#)

#pax STRATEGY

CASH MANAGEMENT

Our clients may benefit from higher rates and yields on the cash and savings portion of their portfolio's.

Do you know what your cash is earning?

Contact our office to discuss.

OFFICE CLOSED NOVEMBER 23RD & 24TH

Happy
Thanks
Giving

pax | PURSUING LIFE
WEALTH GROUP at PEACE

TEAM UPDATES

pax
WEALTH GROUP

Welcome

KELCEY
COCHRAN

CLIENT SERVICE ASSOCIATE



LOOKING FORWARD

Goal setting and intentional planning does yield results. Our recent expansion will enhance our team's efficiencies to better serve our clients.

Our new home provides much needed spaces for one-on-one meetings, family meetings, education sessions, video conferencing and community engagement. We look forward to welcoming you.

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