

The Bulletin

 **Peck | Bulgin**
Wealth Management
RAYMOND JAMES®



From the Desk

What should you look for when deciding which charity to support?

We hear this question often – it’s a good one. We believe there are several factors you should consider to ensure that your contributions will make a meaningful impact.

First, it’s important to research the charity’s mission, values, and goals. The charity’s mission should align with your values and beliefs. Additionally, the charity’s goals and objectives should be clear and transparent, with a demonstrated track record of achieving positive results.

Second, it’s crucial to assess the charity’s financial health. This involves examining their financial statements, including their revenue, expenses, and assets. Charities that are financially stable are better equipped to deliver their services and programs consistently.

Finally, you should consider the impact of your donation. A donation may have a greater impact when directed towards a specific project or program within a larger organization or going to a smaller organization directly.

By considering these factors, you can choose a charity that aligns with your values, is financially stable, and can make a meaningful impact with your donation.

In the Spotlight

Simple Safeguards

How to Stay Safe From Identity Theft and Cybercrime



Is my information safe?

Celebrating Father's Day

Memories are the greatest inheritance fathers leave their children. Thank you to each of our fathers for so many wonderful memories!

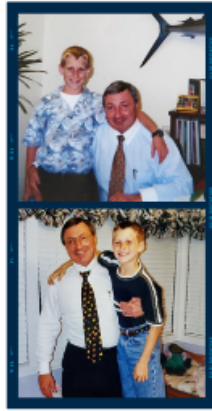
We wish each of you a very Happy Father's Day.



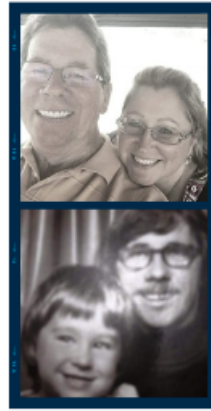
*Casey &
Willie*



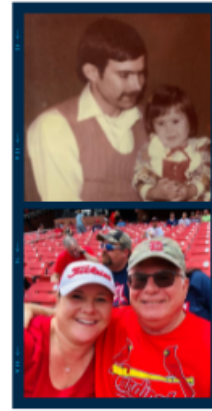
*Jesse &
Terry*



*Will &
Allen*



*Renee &
Cliff*



*Elizabeth &
Bill*

Father's Day

The third Sunday in June marks Father’s Day here in the United States. The celebration honors fathers, fatherhood and paternal bonds, as well as the influence fathers and father figures have on their children and our communities.

The holiday was first introduced to Congress in 1913 but didn’t gain recognition until 1966 when Lyndon B. Johnson issued the first presidential proclamation honoring fathers. It became a permanent national holiday six years later when President Richard Nixon signed it into law.

Countries around the world also celebrate fathers. Italy’s Festa del Papa, for example, takes place March 19, along with Portugal’s Dia do Pai and Spain’s Dia del Padre. However, the third Sunday in June is by far the most popular, with at least 70 countries marking the occasion on the same day.

We hope this year you have an opportunity to spend time with or remembering your father or father figures in your life – and if you are a father, being celebrated by your family.

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Adopt-A-Highway Clean Up Attempt #1

Jesse and Will had planned to take the morning to do trash pick-up on Bailey Road on Amelia Island. However, our adopted road is so clean that they left virtually empty handed. In fact, Will was so happy to find what he thought was trash that he pulled a gas line marker out of the ground! It is important to note that no humans were harmed during the cleaning of our road!

Articles



Complex, Significant Wealth Warrants Elevated Support

When it comes to the management of significant wealth, quality recommendations beat quantity. For families with sizeable portfolios, having access to sophisticated investment options, coordination between other professional services and even discussions about building a philanthropic legacy all require a suite of elevated services that you may not have considered inquiring about.

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Define Your Personal Philanthropic Mission

A growing number of families are thinking “big picture” when it comes to both their financial and philanthropic planning. Through community support projects and initiatives, philanthropic endeavors have the power to promote well-being and make a meaningful impact on people’s lives.

For many high-net-worth families, philanthropy is the vehicle that enables them to contribute to key causes, embody their values and strengthen their legacies for generations to come. But building a compelling philanthropic strategy – with its various components – demands a strong sense of purpose from the outset.

Find Your Mission



Take Your Business Skills to the Nonprofit Sector

Successful business leaders and entrepreneurs often have opportunities to serve on the board of directors of nonprofits or may even want to form their own nonprofit to pursue a cause they are passionate about. But entering the nonprofit world can be a little disorienting to those who have found success in business. The legal rules, of course, are different between these two worlds, as is the ultimate objective.

So, how can you have the most effective impact in the nonprofit sector? Here are a few important questions to consider before exploring your nonprofit opportunities.

Is this right for me?

Market Recap

	12/31/22 Close	5/31/23* Close	Change Year to Date	% Gain/Loss Year to Date
DJIA	33,147.25	32,908.27	-238.98	-0.72%
NASDAQ	10,466.48	12,935.29	+2,468.81	+23.59%
S&P 500	3,839.50	4,179.89	+340.33	+8.86%
MSCI EAFE	1,943.93	2,075.85	+131.92	+6.79%
RUSSELL 2000	1,761.25	1,749.65	-11.60	-0.66%
BLOOMBERG AGGREGATE BOND	2,048.73	2,091.41	+42.68	+2.08%

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"Dad: a son's first hero, a daughter's first love" - unknown

Whether you are a first hero, a first love, or both, we hope you find a few moments to celebrate all that you do to make so many dreams come true. Cheers!



Ingredients & Directions:

Absinthe, to rinse glass

1 sugar cube

1/2 teaspoon cold water

3 dashes Peychaud's bitters

2 dashes Angostura bitters

2 ounces Rye Whiskey

1 ounce Cognac

Garnish: lemon peel

Rinse a chilled rocks glass with Absinthe and discard. In a mixing glass muddle the sugar cube, water, and bitters. Add Rye & Cognac, fill with ice, and stir until well-chilled. Strain into the prepared glass. Twist the lemon peel over the drink's surface and place it in the glass.

Let's Connect!





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1416 Park Ave., Suite 202 Fernandina Beach, FL 32034

245 Riverside Ave., Suite 500 Jacksonville, FL 32202-4927

T: 904-348-5450 | TF: [800.363.9652](tel:800.363.9652) | F: [904.858.4086](tel:904.858.4086)

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maintained and reviewed by the editors of the Wall Street Journal. The NASDAQ composite is an unmanaged index of securities traded on the NASDAQ system. The S&P 500 is an unmanaged index of 500 widely held stocks that is generally considered representative of the U.S. stock market. The MSCI EAFE (Europe, Australia, and Far East) is a free float-adjusted market capitalization index that is designed to measure developed market equity performance, excluding the United States and Canada. The EAFE consists of the country indices of 22 developed nations. The Russell 2000 Index measures the performance of the 2,000 smallest companies in the Russell 3000 Index, which represent approximately 8% of the total market capitalization fo the Russell 3000 Index. The Bloomberg Barclays US Aggregate Bond Index is a broad-based flagship benchmark that measures the investment grade, US dollar-denominated, fixed0-rate taxable bond market.

Rachael Reid

From: Rachael Reid
Sent: Thursday, June 8, 2023 11:04 AM
To: Rachael Reid
Subject: FW: Peck Bulgin Bulletin June 2023 [ADV]

Best regards,

RACHAEL REID
Advisor, Supervision
Advertising Review

From: Elizabeth Wagnon <Elizabeth.Wagnon@RaymondJames.com>
Sent: Wednesday, June 7, 2023 11:12 AM
To: Elizabeth Wagnon <Elizabeth.Wagnon@RaymondJames.com>
Subject: Peck Bulgin Bulletin June 2023 [ADV]

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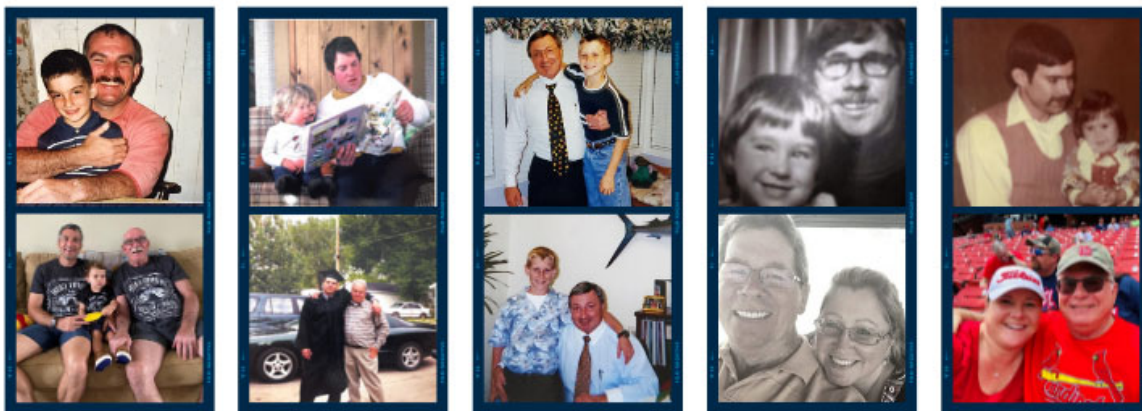


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