



# YERBA BUENA

Financial Partners

The Mint Edition



## QUOTE OF THE MONTH

*Perhaps the feelings that we experience when we are in love represent a normal state. Being in love shows a person who he should be.*

*-Anton Chekhov*

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## Investing Your Beliefs



Often, investing is not merely a financial venture but a reflection of one's beliefs and values. The choices made in investments can deeply resonate with personal outlooks and ethical stances. Great investors like Sir John Templeton and Warren Buffett have demonstrated how aligning investments

with moral and spiritual principles can contribute to success in the financial realm.

Sir John Templeton, hailing from a small Tennessee town, became one of the wealthiest individuals globally while embodying profound philanthropy. His curiosity about science, religion, and economics enabled him to identify opportunities in emerging industries and markets that others overlooked. Templeton's emphasis on investing in companies that align with his ethical standards and continuous pursuit of knowledge underscored his belief that success stems from seeking answers to new questions.

Warren Buffett, known as the "Oracle of Omaha," exemplifies the power of living by an inner scorecard rather than an outer one. His humble lifestyle and commitment to staying true to his core beliefs have contributed to his enduring success in the financial world. Buffett's guidance to invest within one's circle of competence emphasizes the importance of self-awareness and steadfastness in the face of uncertainty.

Templeton and Buffett have shown that success is not solely measured by monetary gains but by the impact one has on others and the alignment of actions with personal values. Their legacies highlight the significance of humility and staying true to one's principles. Collaborating with a financial professional can provide valuable insights and guidance in pursuing a harmonious balance between values and market understanding for individuals seeking to navigate the complex world of investments while staying true to their beliefs. By investing in alignment with one's beliefs, individuals can strive to build wealth and potentially leave a lasting legacy of integrity and compassion in the financial world.<sup>1,2</sup>

## Embracing Technology for Connectivity and Engagement



In today's dynamic world, technology is vital for fostering connections and keeping us engaged, even as we age and approach retirement. Technological advancements have revolutionized communication and interaction, from social platforms to video conferencing tools.

Technology enables us to

bridge distances and stay in touch with loved ones, colleagues, and friends. Social media platforms facilitate real-time sharing of updates and memories, nurturing community and togetherness across geographical boundaries.

Video conferencing tools have become essential for remote work and virtual meetings, allowing for seamless communication and maintaining personal connections in a digital environment. These platforms facilitate face-to-face interactions, fostering collaboration and engagement.

Moreover, technology has transformed how we access information and entertainment. Online learning platforms offer a wealth of educational resources while streaming services provide diverse content for learning and entertainment purposes. Telemedicine is a valuable resource for remotely connecting patients with healthcare providers. Virtual doctor visits and telehealth services offer convenient and accessible healthcare options, particularly when in-person visits are not feasible. As we navigate the digital landscape, it is important to embrace technology responsibly. Balancing online and offline interactions is key to prioritizing meaningful connections and genuine relationships in a tech-driven world.

By harnessing technology for connectivity and engagement, we can leverage its potential to enrich our lives, broaden our horizons, and cultivate deeper connections, which becomes even more important as we approach the retirement phase of our lives.<sup>3</sup>

## Health Tip - When Facing Intense Heat, Adjust How You Drink and Eat



You may consider altering your food and fluid intake when it gets hot. The American Red Cross advises you to eat frequent, small meals rather than large ones under such conditions. Your fluid consumption should be steady during the day, and it is best to do without alcohol or caffeinated drinks.

## DID YOU KNOW?

### The Man Who Created Coca-Cola Had a Specific Use in Mind



Like many wounded in the Civil War, Dr. John Pemberton had become dependent on morphine for pain. In 1886, he began making coca wine to see if it could take the narcotic's place - but alcohol was soon banned in Atlanta, where he lived. He then substituted citric acid and sugar for wine and added carbonated water. The rest is history.<sup>4</sup>

## ON THE BRIGHT SIDE



*Kevin Ford is featured in a viral video thanking his employer for gifts honoring his years of service. (K.M. Cannon/Las Vegas Review-Journal) @KMCannonPhoto*

Kevin Ford, a dedicated fast-food worker, made headlines for his remarkable 27-year streak of never missing a day of work. Through crowdfunding, Ford recently achieved a significant milestone by purchasing a new home with nearly \$450,000 in donations from supporters worldwide. Sharing his journey on social media, Ford expressed his gratitude and showcased his new residence in Nevada, emphasizing the impact of community generosity. The heartwarming story began in 2022 when a viral video highlighted Ford's unwavering dedication, sparking a wave of donations and gifts.<sup>5</sup>

## BRAIN TEASER

A word I know. Six letters it contains. Subtract just one, and twelve remain. What word is this?

**Answer: Dozens**

Best regards,

Andrew Zittell  
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1. CrossingWallStreet.com, March 7, 2024
2. Fortune.com, March 7, 2024
3. National Library of Medicine, March 7, 2024
4. Today I Found Out, March 7, 2024. Any companies mentioned are for illustrative purposes only. It should not be considered a solicitation for the purchase or sale of the securities. Any investment should be consistent with your objectives, timeframe, and risk tolerance.
5. NBC's Today, January 4, 2024

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