



WHITE OWL

FINANCIAL ADVISORS

## QUEST CORNER

Welcome to **Quest Corner**, our newsletter with spotlights on lifestyle information, financial tips, local happenings, and more. We hope you will find this to be a valuable and entertaining resource.

---

**Advisor Message**



Happy Maycember! This term perfectly captures the flurry of activity and excitement that accompanies the arrival of May. With Mother's Day, college graduations, and Memorial Day on the horizon, there's ample reason to embrace the special moments this month brings.

As we raise our glasses to celebrate the accomplishments of graduates, express our appreciation to our mothers, and extend heartfelt gratitude to our military families, it's essential to also keep track of important deadlines. For those venturing into college, mark your calendars for June 30th—the deadline for Free Application for Federal Student Aid (FAFSA) submissions.

In this month's newsletter, we'll dive into the intricacies of college savings, examining the advantages and disadvantages of 529 plans and how they intersect with FAFSA considerations. Here's to a May brimming with joy, gratitude, and significant milestones!

---



## **Financial Tips**

### **Does a 529 Plan Affect Financial Aid?**

Are you thinking about using a 529 plan to prepare for your child's future college expenses? If so, are you concerned about potentially impacting their eligibility for federal financial aid? This is a common among worry among many families.

The impact of your 529 plan on financial aid eligibility varies based on factors like ownership and the type of aid sought. However, in most cases, its effect is minimal, often proving beneficial. Read the article linked below to learn more.

[Click here for more.](#)

---

**Lifestyle**  
**How Mother's Day Started, Plus 5 Thoughtful Ways to Celebrate**

We all know when Mother's Day is, but how many of us know when and how the holiday started?

In recognition of the day in which we all celebrate and honor our moms, check out the article below for the fascinating history behind Mother's Day. And keep reading for some tips on how to make this year's celebration something special for the mother (or mothers) in your life.

[Click here to read the article.](#)

---





## **Triangle Happenings**

### **Got to Be NC Festival, May 17-19, 2024**

Putting the best of N.C. food and beverage on display, the Got to Be NC Festival offers tons of eating opportunities, live music, a huge collection of antique tractors, a carnival for children, and more activities (plus free parking and admission) at the North Carolina State Fairgrounds. More at [gottobenfestival.com](http://gottobenfestival.com)

### **Artsposure - The Raleigh Arts Festival, tentatively May 18-19, 2024**

One of the Southeast's premier arts festivals, Artsposure - The Raleigh Arts Festival attracts more than 80,000 people to downtown Raleigh during the third weekend of May each year. Celebrating fine visual art and live music since 1980, the festival puts more than 180 artists' work—using countless mediums—on display for all to see and enjoy during the free festival. More at [raleighartsfestival.com](http://raleighartsfestival.com)

**Women’s Leadership Conference, May 21<sup>st</sup> 2024**  
**Raleigh Chamber of Commerce**

The Raleigh Chamber Women’s Leadership Conference accelerates leadership development for women. The conference provides women with the knowledge and skills needed to have a greater impact and broader influence within their organizations. Get additional details at [this location](#).

**NC Sugar Rush, May 26, 2024**

One of the sweetest events of the year, NC Sugar Rush is an all-dessert food truck rodeo held in downtown Raleigh's City Plaza. More than 20 vendors—offering a range of goodies from cotton candy to cupcakes to cherry pies—will be on hand, along with face painters, balloon artists, and more to keep the kids entertained. More at [ncsugarrush.com](https://ncsugarrush.com)

---

**Word of the Month**

The Word of the Month is: **Matriculate**

**Matriculate:** verb [məˈtrɪkjəˌleɪt]

**Meaning:** to enroll as a member of a body especially of a college or university

**Example sentence:** He matriculated in the English Literature Department at the University of North Carolina.



Thanks for reading. Would love to hear your thoughts!

Sandra Wang Stowe  
White Owl Financial Advisors  
[whiteowlfinancial.com](http://whiteowlfinancial.com)  
919-635-1180



Disclosure: Securities are offered through Registered Representatives of Cambridge Investment Research, Inc., a Broker/Dealer, member [FINRA](#) & [SIPC](#) to residents of: NC, TX Advisory services are offered through Cambridge Investment Research Advisors, Inc., a Registered Investment Adviser. White Owl Financial Advisors and Cambridge are not affiliated.

Insurance: Life / Health/ Variable Contracts / Disability / Long Term Care through Insurance Agency Marketing Services, Inc.

**Our mailing address is:**

White Owl Financial Advisors  
2601 Weston Parkway,  
Suite 201, Cary, NC 27513

Want to change how you receive these emails?

You can [update your preferences](#) or [unsubscribe from this list](#).

