



Spring is here - and with it are all of our favorites: spring gardening, spring cleaning, and spring cleaning your finances!

Spring gardening and spring cleaning your finances have a lot in common. They both require a little bit of elbow grease and a lot of patience. And just like planting a garden, it's important to start with a solid foundation and build from there. So go ahead and get your hands dirty! Who knows, you might just end up with a bumper crop of savings!

As always, we are here if have any questions or you feel like you need to spruce up your plan!

Don't Forget! Keep up-to-date on your [Personal Finance Calendar](#):

Give us feedback through our [Annual Client Survey](#)!

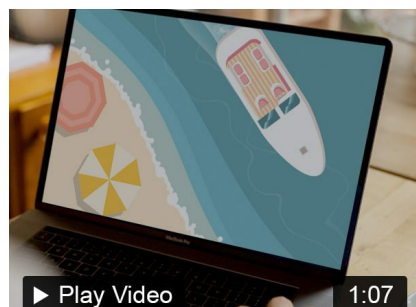
Coming up in May:

It's spring, and financial prep is easy!

- Create or update your home and personal property inventory. Use your phone and reliable digital-backup service to record and store videos of your valuable possessions.
- Take a look at your estate strategy, and see if it continues to reflect your family's wishes. Were there any marriages or divorces in the past year? Did your family welcome a new child or grandchild?

[Check Your Estate](#)

Retirement Planning



Preparation is the Key to Retirement

The simplest ideas can sometimes make a massive difference over time. Enjoy this brief video to learn more.

[Learn More](#)

What's New



Nothing is more important to us than exceeding your expectations! Our Annual Client Survey is now open (we promise it will only take a couple of minutes), and we would love to get your thoughts! The feedback we learn from you always helps us improve and serve you better through the next year!

[Click here for the Client Survey](#)

Market Insights



Stay up to date! We are posting weekly market insights on our blog! We will also be releasing these on our social media accounts - Facebook, Twitter and LinkedIn. If you haven't followed us - now is the time!

[See Market Insights Blog](#)

Hobby of the Month



When Spring hits, we become huge nerds about our gardens! We have tomatoes galore, peppers, herbs and lettuce growing along with some backyard chickens!

We would love to hear what you are growing. Send your best gardening pics or tips our way!



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