

Friday, September 1, 2023

To All Financial Journey Partners Clients,

We've had lots of fun this summer and hope you have too! The FJP 2023 Photo Contest is near the end. Our clients have been sending us lots of photos. If you have not yet submitted your photos, there are still a few more days to submit your photos, until the end of Labor Day. See more on the Photo Contest below.

The stock market has been surprisingly strong in the first 7 months of the year. The recession that so many analysts predicted at the start of this year has not occurred and the economy has also been surprisingly strong. We had a webinar on August 3 where Elaine and Scott gave their views on the state of the US economy and the US stock market. The article below will share how you can read the highlights and watch the webinar replay.

August is an important month for us. This year, it is the 5th Anniversary of Financial Journey Partners. We're so grateful you are on this journey with us. See the article below for a look back at the past 5 years and looking ahead to a bright future.

Topics in this edition of *Insights* include:

- 5th Anniversary for Financial Journey Partners!
- Mid-Year Economic Update – Webinar Recap
- 2023 FJP Photo Contest – Enter Through Labor Day
- FJP Event Schedule for 2023 & First Half of 2024
- Enjoy the Journey – Visiting with Family and Friends

5th ANNIVERSARY FOR FINANCIAL JOURNEY PARTNERS!

We are celebrating our [5th Anniversary for Financial Journey Partners!](#) It has been inspiring and rewarding to apply our decades of experience to build a firm with the central focus being the needs of our clients.



We started this firm with our amazing team in August 2018. We created a firm known for helping our clients make smart decisions so they can do the most important things to them and enjoy the journey.

We are honored by your trust in us to keep your money aligned with your goals and dreams and we love to encourage you to enjoy the journey along the way. Our partnership with you is built on trust, collaboration, and fun. We appreciate you and we're excited about the future.

Let's look back at the highlights of the past 5 years and then look ahead to the future.

[READ OUR STORY](#)

Mid-Year Economic Update – Webinar Recap

We are now more than halfway through 2023. The year started with most analysts calling for a slowdown in the economy and a weak year in the stock market. Instead, the economy has been rolling along and the stock market has had a surprisingly strong start to the year.



Elaine, Scott and Linda hosted a webinar on August 3 to share our mid-year economic update and we want to [share the highlights for those who could not attend](#). You can read the highlights and we have made the webinar replay available for a few months. Feel free to share this material with your friends and colleagues -- it is a great way to introduce them to FJP too!

[ACCESS WEBINAR AND HIGHLIGHTS](#)

2023 FJP Photo Contest – Enter Through Labor Day

The [2023 FJP Photo Contest](#) is nearly over, but you still have a few more days to submit your photos. The deadline for submitting photos is the end of Labor Day, September 4, 2023.



As in past years, the FJP team will pick the 5 finalist pictures in each of the three categories. In September, an email survey will be sent to all our clients to select the winning photo in each category.

The winner of the nature category will receive a canvas of your photo for your home and on the wall in our conference room with past annual winners. We also put our favorite 12 photos of nature and beautiful landscapes in the annual FJP desk calendar.

The winners will be announced at our Client Appreciation Halloween Party on October 15, 2023!

[SEND PHOTOS to ARIELLE](#)

FJP Event Schedule for 2023 & First Half of 2024

We have an educational and fun lineup of events in the next 12 months. We have planned some in-person events for the folks who live in Northern California and webinars so we can include our clients who live in other parts of the country. We hope you can join us.

October 15, 4-7 pm (In Person) – [Client Appreciation Halloween Party](#) at our Conference Center at the Metro Plaza!



Yes, costumes are encouraged but not required. Based on client feedback, we moved the date to Sunday, October 15, so clients do not have to drive through heavy weekday traffic. [Check out some of the fun we have planned!](#)

Save the Dates for These 2024 Events:

- **January 25, 2024, Thursday, Noon** (Webinar) – State of the Economy, with special guest speaker Karlan Patel from State Street
- **March 21, 2024, Thursday, Noon** (Webinar) – Medicare Primer, with special guest Jennifer Taboada from BlackRock
- **April 18, 2024, Thursday, 5 pm** (Webinar) – Estate Planning for All Ages
- **May 4, 2024, 1-4 pm** (In Person) – May the 4th Be With You Star Wars Party, at Metro Plaza
- **August 15, 2024, 5 pm** (Webinar) – Mid-Year Economic Update with Elaine and Scott

**** NOTE: All times are in Pacific Time – More 2024 events are coming soon!**

Let [Arielle](#) know if you are interested in these events at arielle@financialjourney.com!

[FJP EVENTS!](#)

Enjoying the Journey – Visiting with Family and Friends

Summer is a great time to get out and enjoy time with family and friends. Linda created this beautiful charcuterie platter to share at her summer gathering.



Our clients have told us great stories of places they traveled this summer, both within the US and overseas. We heard stories of people cruising in Alaska, the Caribbean and land trips to Branson, Nashville, Lake Tahoe, Half Moon Bay, Palm Springs, San Diego, Montana, Wisconsin, Mexico, Norway, Greece, Azores, and Cape Town to name a few! Elaine and Scott also completed a bucket list trip on a cruise that visited Spain and Portugal.

Time spent exploring these grand locations, cooking a meal together with family or simply sharing an abundant appetizer tray with friends in your backyard is enjoying the journey.

We are excited to hear more of your summer stories and see more pictures you send us for the Photo Contest. Seeing all your pictures is a highlight of our summer. We hope you have a great Labor Day weekend.

If there is anything we can do to help you, please [give us a call](#).

[Elaine, Scott, Linda](#)

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