



This month, find information about trusted contacts, an opportunity to lunch and learn with us, fun facts about Captain Bonnie, and details about our upcoming Community Night!



Add a Trusted Contact

We have witnessed a handful of situations where it appears a client or their spouse may either be declining cognitively or possibly influenced by an outsider who may have self-serving intentions.

Here are a few recent examples of what we've seen:

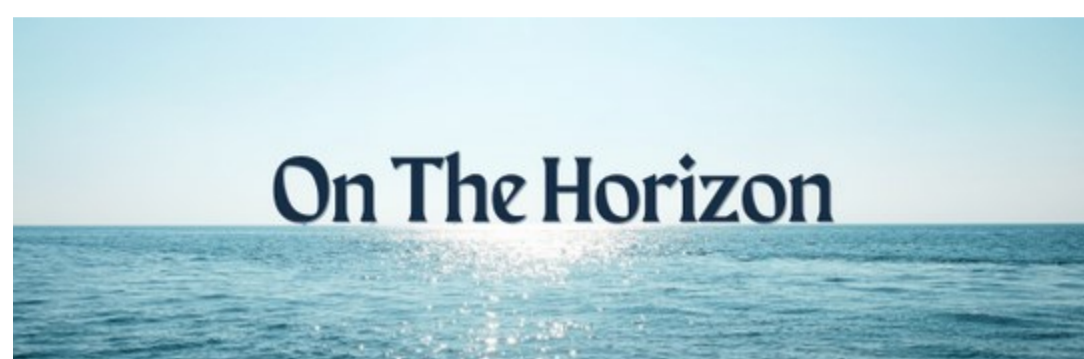
- A client called three weeks in a row to initiate the same large distribution without remembering the previous calls
- A client changed his beneficiary from his three adult children to his "new friend from the library"
- A client who doesn't drive asked to take a withdrawal to purchase a car

These are examples of situations when we're asked to process a suspicious transaction for a client, and it's unclear whether they fully comprehend the consequences.

At First Anchor, we strive to know each of you so well that out-of-the-ordinary requests catch our attention. You have the option to add a trusted contact to your account as an added measure of communication.

A **trusted contact** is the person that you have designated as the person we have permission to contact if we have concerns about your financial well-being. A trusted contact cannot initiate transactions on your account, but instead, serves as a resource to help identify potential exploitation and other concerns. We do not contact them unless we have genuine concern.

You can initiate the process of adding a trusted contact by [reaching out to the office](#) or during your annual update meeting.



Lunch & Learn with First Anchor

As we continue to promote financial literacy and break down the barrier of intimidation, we are scheduling in-house Lunch & Learn programs as opportunities for you to continue to grow your knowledge in a comfortable and familiar setting with other like-minded individuals.

On **Wednesday August 6 at 11:00am**, join us in our Portsmouth office for a comprehensive discussion about the importance of **freezing your credit reports** with each of the four agencies, including a demonstration and walkthrough for each.

To participate, click the link below. The only requirement is to bring your laptop, tablet, or other personal device on which you are comfortable accessing the internet, and a cell phone that can receive authentication texts.

Seats are very limited so that each participant can receive one-on-one guidance.

[RSVP for Lunch & Learn](#)

If you feel more comfortable with a one-on-one meeting in person or over Zoom, reach out to [Joelle](#) directly to schedule a solo credit freeze session!



Getting to Know the First Anchor Crew

"Bonnie may be small, but she is mighty. She's always on the go and ready to take on any adventure that comes her way with a smile." - Johanna and Joelle

Here are some interesting facts about Captain Bonnie that you might not know!



- Bonnie's preferred mode of transportation is her scooter! It's not uncommon to see her whizzing around the streets of Portsmouth.
- She is a sports enthusiast and plays semi-professional softball, candlepin bowling, ice hockey and now enjoys many a game of pickleball.
- Bonnie is a dog lover but highly allergic to cats and dogs. However, with poodles being a hypoallergenic breed to Bonnie and her rescued ten mini or toy poodles (and counting!): Fielder, Coachie, Leaguer, Rajah-Belle, Keeper, Pupcake, Sky, Charlie, and her most recent squatters: Benjamin and Teddie.
- The most common question Bonnie gets asked these days is whether she's going to retire soon. (PS: the answer is no!)



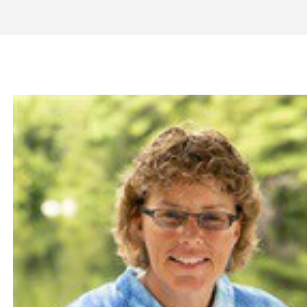
Now that the cruise has sailed past us (pictures coming soon!), the next event on the horizon is Community Night! For over a decade, we have organized this event to bring together our friends, family, neighbors, and loved ones in support of a greater good.

We are excited to be working with [Kids Five & Over](#) for the second year in a row, helping to bring fun and joy to the lives of local children.

This year, you'll see beloved Community Night classics like our live and silent auctions and our Wine Pull, along with some new games to try.

Save the date: Saturday, September 20 @ 3:00pm

Invitations coming soon!



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