

Newsletter – Winter 2021

" Never add more money to this (mad money) account just because the market has gone up and profits are rolling in. Never mingle your speculative investments in the same account, nor in any part of your thinking."

Benjamin Graham

Dear clients and friends,

Happy New Year and we wish you a healthy, prosperous 2021!

As we start a new year, we are focused on the common concerns families of means typically have as we support them ~

1. Making smart decisions about their money
2. Mitigating their taxes
3. Taking care of their heirs
4. Make sure their assets aren't unjustly taken from them
5. Magnifying their charitable giving

Attached are the Ten Surprises of 2021 from our partner Blackstone. You will see they are suggesting the market will correct by almost 20% this year, but then recover and keep growing. We know that the market does correct from time to time, we just don't know when or by how much. So we want our clients to keep this in mind and not take any more risk than necessary to achieve their goals.

[The Ten Surprises of 2021](#)

We welcome your comments and questions, and appreciate our new clients who joined us this past quarter and have placed their trust in us.

All my best!



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