

Client Connection

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Your Goals. Our Planning. Intelligent Wealth Management



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*Please feel free to call us
at anytime with questions.*

Our newsletter is generally focused on financial planning topics to keep long term goals in sight, rather than the latest headlines. With recent market volatility higher than it has been in some time, we thought we would add one additional link that provides a current market viewpoint. Please contact us if we can be of help addressing concerns in current market environment.

Headlines

Has the U.S. Lost it's MOJO? A perspective on recent events from Oppenheimer funds.

Don't Get Burned at Public Wi-Fi Hotspots: Are you taking the right precautionary steps?

Economic Update: Our Raymond James professionals share their insight and outlooks for the road ahead in the 2011 Mid-Year Economic Update.

Talking to Your Child About College Expectations: Talking points to have a frank discussion with your child.

401 (k) In-Plan Roth Conversions: 401 (k) plans can now permit in-plan Roth conversions. Is this an option for you?

Website Resources

- ◆ [Financial Journeys](#)
- ◆ [Successful Women](#)
- ◆ [Small Business Dimensions](#)
- ◆ [Investor Access](#)

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