



"Coffee on Us - Navigating the Crazyiness"

When the banking markets turn as volatile and confusing as they have most recently, even the most patient of investors comes to question the wisdom of the investment plan that they've been following.

At Born Investment Group, we've seen a lot of difficult and fluctuating markets come and go. We can certainly empathize with people who find the current environment troublesome and disturbing. We also understand that you may have additional money, savings, investments, etc. outside Raymond James and/or with other advisors, and we'd welcome the opportunity to discuss them with you – No catch!

We'd like to help, if we can – And to that end, here is what we offer:

A cup of coffee and a second opinion.

You are always welcome to come and visit with us for a while. We'll look at your complete portfolio and outline your financial goals. Then, we'll review everything for you and with you, to best develop a plan tailored to what your investments are intended to do for you.

If we think your complete investments continue to be well-suited to your long-term goals – In spite of the current market turmoil – We'll gladly tell you so and thank you for your time and good judgement. If, on the other hand, we think some of your investments no longer fit with your goals, we'll explain why – In plain English. And, if you'd like, we'll recommend some alternatives.

Either way, the coffee is on us!

PXNETWORKING *With Stella and Sterling*

...and introducing Max!





So, this happened. *Meet Max* - The newest member of our Born Investment Group Team! Max joined us on Traci's Birthday in late February at the ripe age of 10 weeks old and a hefty 3.9 lbs. He is settling in nicely, has flown first-class to Dallas, TX, and back, and (...as of the date we are typing this, 4 weeks later) per the TSA, tipping the scales at a bruising 5.75 lbs. - Well done, sir! Max doesn't have an official position yet, although he is excelling at becoming Sterling's menacing assistant. We would love to hear your pawfect job-title suggestions!

Please drop us a quick email or give us a call with your ideas!!

Articles



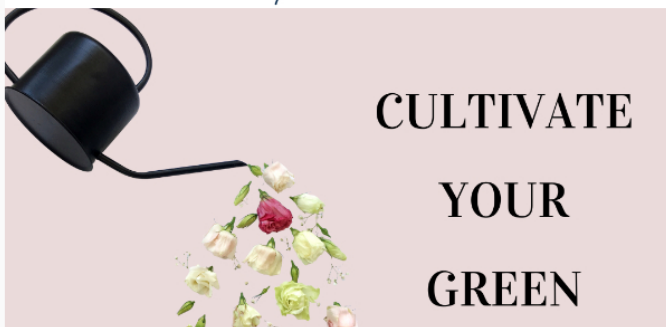
We cannot think of a better time to discuss the importance of financial literacy, education, and planning for the future, especially in the context of the great wealth transfer. With more than \$84 trillion expected to change hands over the next two decades, educating the next generation on financial management and responsibility is crucial.

Here are a few things to keep in mind when trying to foster financial values in your family:

- Create a personal financial mission statement with your family. This could be about pursuing financial literacy or focusing on charitable giving.
- Schedule regular family meetings to discuss values and financial goals.
- Teach financial literacy to your children. This can include showing your children how to save money, distinguishing between needs and wants, or overviews of basic financial principles such as budgeting, credit, or even investment strategies.

By prioritizing financial education and planning during Financial Literacy Month *and beyond*, we can help prepare future generations to manage their wealth responsibly and carry on their family's financial legacy.

Spotlight





THUMB

The birds are chirping, the flowers are blooming, and it's time to put on your gardening gloves! Spring is right around the corner, and what better way to enjoy the warmer weather than by getting outdoors? We love seeing investments grow, but it's fun to see plants growing too.

Here are a few tips to help you cultivate your green thumb:

- **Start small:** Don't go overboard on your first attempt! Begin with plants that are easy to care for and build your confidence before branching out.
- **Pick the right plants:** Consider your garden's sunlight and water conditions and choose plants that will thrive in those conditions. Local plants are also a great choice since they're already adapted to your area's climate and soil.
- **Prepare your soil:** Healthy soil is crucial for healthy plants. Get your soil in tip-top shape by adding compost or other organic matter to improve its structure and fertility.
- **Water wisely:** Most plants need regular watering, but too much or too little can spell disaster. Keep an eye on the soil and water deeply when the top inch is dry.
- **Fight the pests:** Pesky critters can quickly turn your garden into a snack bar. Use natural pest control methods like companion planting or helpful insects to keep them at bay.

So, what are you waiting for? Grab your trowel and get to it! Happy gardening!

Lets Connect



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