# CHISHOLM CAPITAL ADVISORS of RAYNOND JAMES

JUNE 2025

#### WELCOME TO OUR 1ST EDITION OF

# **Trailhead News**

### <u>In this</u> <u>newsletter:</u>

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- Resources
- New Website
- Introducing our
  - Newest Team

Member

- Family Update
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#### About our newsletter

We have created our newsletter, "Trailhead News" to keep clients informed, not only about the markets, but also about our practice, training and education updates, client events, important dates and announcements.

The suitably titled, "Trailhead News" will be distributed quarterly to clients, via email as well linked on our website: chisholmca.com. We hope that you enjoy this publication, as we share more intimate and timely insights into our practice and personal lives.



#### <u>Upcoming Market</u> <u>Holidays</u>

BUSINESS WORKSHOP

- Thursday, June 19th Juneteenth
- Friday, July 4<sup>th</sup> Independence
  Day
- Monday, September 1<sup>st</sup> Labor
  Day



#### Free Resources @

WWW.CHISHOLMCA.COM

Check our the resources tab on our website for access to client access videos, digital version of our quarterly magazine, and more!

## A PERSONALIZED APPROACH TO MANAGING WEALTH

#### Our Website has Launched!

PLEASE VISIT US AT WWW.CHISHOLMCA.COM

We are excited to announce our website has launched, providing details about our team, our process and resources for our clients. Our website also includes a link to Client access.



# welcoming our newest team member Madeline Prater



Investing in the next generation is not only important for clients, but also to strengthen our practice! We are pleased to welcome Madeline Prater, Rita's oldest daughter, to our team.

Madeline Prater joined Chisholm Capital Advisors of Raymond James, in March this year. Prior to joining the team, Madeline served as the business manager in the Planning and Development Department for the City of Southlake. She is now Series 7 and Series 66 licensed!

Fun Facts Madeline lives in Euless with her husband, Hunter, where they purchased their 1<sup>st</sup> home last year. They have a small cori–chihuahua rescue, Bex. She loves cooking, golfing, and anything Oklahoma Sooners (especially Football season!). Favorites: movie, Father of the Bride; season, Fall.



# Cona is 3!

Addison and Beth's daughter, Cora turned 3 this June. Favorite things:

- Ice Cream
- The colors Pink and Green
- The park!

Don't let time pass on investing in your kids and grandkids future! Show them the power of compound savings. Follow <u>this</u> <u>link</u> to check out our savings calculator.

### Chart of The Week:



Seasonally speaking, we are entering the "Summer Doldrums". Statistically, since 1994, 100% of equity index returns, on average, have occurred in two three-month periods (early March-early June and early October-December). Starting this week is the "summer doldrums".



#### **Our Commitment**

We are driven not only by years of experience, but by disciplined planning, attentive insight and analytical capabilities.

Our objective is to serve as your trusted financial partner – to help you arrive at the informed decisions you value, and enjoy the confidence in knowing that every financial matter is fully addressed.

We are committed to work alongside you, to create a clear plan that aligns your assets with what matters most, whether that's retirement, your children's education, or leaving a legacy.

Rita Wright Oujesky Vice President, Investments

Addison Conley, AAMS® Financial Advisor

Rhonda Eagle Senior Client Service Associate Robert W. Driskell, Jr., MBA Senior Vice President, Investments

Madeline Prater Financial Advisor

Julie Theobald Client Service Associate