

Spring Greetings!

As May is approaching, so are graduation celebrations. Congratulations to our clients' children and grandchildren who are graduating this May! On a personal note, my daughter/Dwight's granddaughter, Catherine, is graduating in May from the University of Illinois with a degree in advertising. She will begin her career in Chicago with HH Global. For those of you with children or other relatives graduating this year, or in the near future, we invite you to a Zoom event we are hosting on Tuesday June 11th at 5:00 pm CDT, titled "Adulting 101." We will cover the basics of financial literacy for graduates headed into the "real world" e.g., budgeting, saving, investing, differences in retirement accounts. (Freshly-graduated Catherine will be joining us.) Please reach out to us for the Zoom link. Again, this is open to any of your family members; they do not have to be clients.

We recently purchased some new tax planning software that we are excited about using with our clients. Although we do not give tax advice, we want to use this software in collaboration with your tax preparer or CPA, in order to run analyses on things like Roth conversions, charitable contributions, eligible credits, and so much more. We are currently testing it and utilizing it with a handful of clients. If this is something you would be interested in, give us a call. We can send you a secure link to gather your return.

Short-term results are usually not that meaningful for our long-term investors, but that just-passed first quarter was lots of fun, wasn't it? The Dow Jones Industrial average was up 5.6%, the S&P 500, up 10.8%, and the NASDAQ climbed 10.9%.