

REID SHERMAN

INVESTMENT GROUP OF

RAYMOND JAMES®

THE OFFICIAL NEWSLETTER OF REID SHERMAN INVESTMENT GROUP

INSIDE THIS ISSUE:

• ELECTIONS AND MARKET HISTORY- 1



• TUPELO OFFICE RELOCATION - 2



• FINANCIAL ADVISOR SPOTLIGHT: JONATHAN RANDOLPH- 2

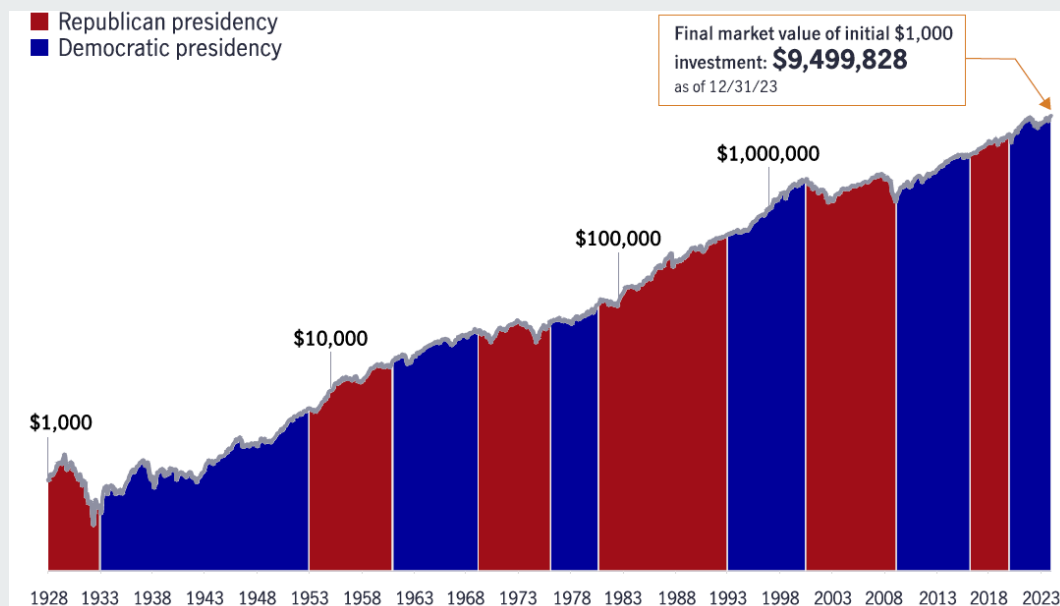


SEMI-ANNUAL NEWSLETTER

LINDSAY REID, CHUCK SHERMAN, JONATHAN RANDOLPH
& THE REID SHERMAN INVESTMENT GROUP TEAM

Elections and Market History

Financial markets have generally shown resilience throughout four-year presidential election cycles, with changes in political party control of the White House and Congress appearing to have little discernible difference on long-term stock market performance. While election seasons can stir up strong emotions in investors and drive market volatility, trying to time the markets or make investment decisions based on perceived election trends could prove unwise versus simply investing for the long term.



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REID SHERMAN INVESTMENT GROUP TEAM

Tupelo Office Relocation

We are excited to announce that our Tupelo office has relocated to a newly renovated space on West Main Street. Our new address is 322 West Main Street, Tupelo, MS 38804. If you have any questions, please feel free to reach out at 662-840-4001.

We look forward to seeing you at our new office!

Office Happenings

- ✓ Reid Sherman Investment Group was named to the 2024 edition of the Forbes Best-In-State Wealth Management Team ranking for second consecutive year.

Forbes
BEST-IN-STATE
WEALTH MANAGEMENT TEAMS 2024

SHOOK® RESEARCH
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- ✓ Reid Sherman Investment Group was honored to sponsor Oxford Middle School's Teacher of the Year award to 8th grade English Teacher, Dr. Emily Riser. Lindsay and Chuck are pictured presenting the award at the Teacher of the Year luncheon on February 21st.



Traditional & Roth IRA Contribution Limits for 2024

\$7,000 or your taxable income, whichever is lower
If you are 50 or older by the end of 2024, the contribution limit is \$8,000

Upcoming Dates to Remember

April 15- Tax day & last day to contribute to traditional and Roth IRAs for 2023

Stock Market Holiday Closures

March 29: Good Friday
May 27: Memorial Day
June 19: Juneteenth
July 4: Independence Day

Forbes Disclosure: The 2024 Forbes ranking of America's Top Wealth Management Teams Best-In-State, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone and in-person due diligence interviews, and quantitative data. This ranking is based upon the period from 3/31/2022 to 3/31/2023 and was released on 01/09/2024. Advisor teams that are considered must have one advisor with a minimum of seven years of experience, have been in existence as a team for at least one year, have at least 5 team members, and have been nominated by their firm. The algorithm weights factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their practices and approach to working with clients. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Out of approximately 10,100 team nominations, 4,100 advisor teams received the award based on thresholds. This ranking is not indicative of an advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. Neither Raymond James nor any of its Financial Advisors or RIA firms pay a fee in exchange for this award/rating. Raymond James is not affiliated with Forbes or Shook Research, LLC. Please see <https://www.forbes.com/lists/wealth-management-teams-best-in-state/> for more info

Financial Advisor Spotlight: Jonathan Randolph

Jonathan Randolph, *Financial Advisor*, joined the Reid Sherman Investment Group in Spring 2023.

Before his career as an advisor, Jonathan played professional golf from 2011 to 2022. During his successful golf career, he played on the Korn Ferry Tour and ultimately the PGA Tour.

Prior to his professional career, Jonathan played collegiate golf at the University of Mississippi. While at Ole Miss he earned First Team All-SEC and First Team All-America honors. After reaching number 4 in the amateur world rankings, he represented a victorious team USA in the Palmer Cup at Royal Portrush. Jonathan earned a Bachelor of Business Administration degree from the University of Mississippi in 2011. After a successful career in golf, Jonathan followed his passion to pursue a career as a Financial Advisor.

Jonathan is originally from Brandon, MS. He lives in Oxford with his wife, Lacy, and their two children, Boyd (6) and Georgia (4).

We are thrilled to have Jonathan as a member of our team and look forward to introducing him to you!