



The saying “everyone likes progress, but no one wants change” highlights our preference for stability, even when change could lead to better outcomes. As our team embraces positive change by celebrating our one-year anniversary with Raymond James, we’re extremely proud to be part of a firm that was just ranked #1 in the 2023 J.D. Power Survey as the top wealth management firm for Investor Satisfaction.

Although people may resist change because they fear the unknown or the potential for failure, sometimes remaining stagnant isn’t always best. If you’re looking to push yourself out of your comfort zone, while still doing so in a peaceful, welcoming community, we invite you to check out this month’s Spotlight section: Soul Sweat Yoga Studio.

Founded in 2017 by Courtney DeVivacqua, Soul Sweat has grown from a small yoga studio in Old Saybrook, Connecticut to a thriving community with over 10,000 members and a team of over 80 instructors and staff members. Her second location in New Haven is where Andy practices, while Jason is a member of the original Old Saybrook studio.

Remember that graduating toward the familiar and predictable can also affect more than just your investment choices. If you’ve ever wondered whether a fresh perspective could serve you better, don’t let the comfort of familiarity hold you back. Reach out to us for a consultation, or better yet...sign up for that heated yoga class!

- Andy & Jason

## Spotlight



### Soul Sweat Yoga

Soul Sweat Yoga Studio was founded in 2017 by Courtney DeVivacqua, a Connecticut Shoreline native with a deep passion for hot yoga and community. A recent journalism graduate at the time, Courtney faced a pivotal decision—pursue an investigative reporting career in California or take a bold leap into entrepreneurship. With no prior business experience but a strong connection to the transformative power of hot yoga, she chose to build something meaningful in her hometown.

The first Soul Sweat studio opened in Old Saybrook, offering vinyasa-based yoga classes in a uniquely designed heated environment.



Unlike traditional hot yoga studios, Soul Sweat features an advanced infrared heating system combined with steam humidification, creating an optimal balance of warmth and humidity for a powerful, detoxifying practice. From the start, Courtney’s vision was clear: to create a space where people could not only practice yoga but also feel, grow, and connect.



With just six instructors and a small but dedicated student base, Soul Sweat began as a grassroots effort, with Courtney’s mom even stepping in to help run the front desk. As the community grew, so did the studio. Over the years, Soul Sweat has expanded to a second location in New Haven, built a team of over 80 instructors and staff members, and welcomed a combined membership of over 10,000 students.

Despite the challenges of small business ownership—including navigating the COVID-19 pandemic—Soul Sweat has remained committed to its core values: high-quality instruction, a supportive and welcoming atmosphere, and a deep sense of community. The studio now offers a wide range of classes for all levels, from beginners to advanced practitioners, ensuring that everyone can find a home within its walls.

Today, Soul Sweat is more than just a yoga studio—it’s a thriving community built on passion, resilience, and the power of movement. With plans for continued expansion, Courtney remains dedicated to sharing the Soul Sweat experience with even more communities, proving that with vision and heart, anything is possible.

[Visit Their Website](#)

## Articles



Many of us are naturally inclined to resist change, especially when it comes to our finances. This tendency is known as status quo bias, where we prefer things to stay the same, even if changing our approach might lead to better outcomes.

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We've made clients #1.

They've returned the favor.



AWARDS

### Raymond James ranks #1 for advised investor satisfaction, named most trusted in 2023 J.D. Power study

Raymond James Financial, Inc. (NYSE: RJF) has earned the highest ranking for investor satisfaction among those working with a dedicated financial advisor or team of advisors and was recognized as the most trusted company among advised investors in wealth management in the J.D. Power 2023 U.S. Investor Satisfaction Study.

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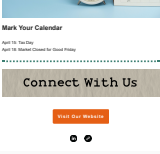
About Raymond James Financial, Inc.

Raymond James Financial, Inc. (NYSE: RJF) is a publicly traded holding company that provides a wide range of financial services, including wealth management, corporate finance, and investment management. The company is headquartered in St. Petersburg, Florida, and has a presence in several other states. For more information, please visit our website at [www.rj.com](#).

As featured in Investor Satisfaction Study, named Most Trusted in 2023 J.D. Power study

The J.D. Power 2023 U.S. Investor Satisfaction Study™ was a nationwide study that ranked the satisfaction of investors working with wealth management firms. The study was based on a survey of investors who had worked with a wealth management firm in the past 12 months. The study found that Raymond James Financial, Inc. was ranked as the most trusted company among advised investors in wealth management in the J.D. Power 2023 U.S. Investor Satisfaction Study. The study also found that investors who work with a wealth management firm are more likely to be satisfied with their investment outcomes. The study was conducted by J.D. Power and Associates, a leading research and consulting firm. The study is a key indicator of investor satisfaction and is used by many financial institutions to benchmark their performance. The study also provides valuable insights into the needs and expectations of investors. The study is a testament to the commitment of Raymond James Financial, Inc. to providing exceptional service to its clients. The study is a reflection of the trust that investors place in Raymond James Financial, Inc. and its advisors. The study is a source of pride for the company and its employees. The study is a testament to the success of Raymond James Financial, Inc. in providing exceptional service to its clients. The study is a reflection of the trust that investors place in Raymond James Financial, Inc. and its advisors. The study is a source of pride for the company and its employees. The study is a testament to the success of Raymond James Financial, Inc. in providing exceptional service to its clients.

## Events



### Mark Your Calendar

April 15: Tax Day

April 18: Market Closed for Good Friday

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If you would like to communicate for these events, please message us directly.

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