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KEEPING IN TOUCH

2020 Spring Newsletter
By Bill Stevens, Wealth Advisor

Your Personal and Financial Well-Being:

Staying in touch is now more important than ever. No one could have predicted a month or so ago that we would be quarantined and stopping all face-to-face meetings. For someone like me, social distancing is HARD. But we care about your health, and for this reason, at least for the time-being, we are meeting clients virtually and by phone only.

We hope through this challenging time in history that you, like us, are realizing what is truly important in our lives. For the Stevens household, the silver lining is found around our dining table; for the first time since, maybe forever, our whole family is home and eating dinner together! The college kids are home, there are no swimming meets or other events to take us away from home... Maybe a little slowing down isn't such a bad thing, at least for this family!

Our office recently - before social distancing - hosted a rare opportunity to meet and discuss current financial markets and changing opportunities with Mark Eibel, CFA® Director, Investment Strategies for Russell Investments. Mark helped contextualize market events against the backdrop of long-term investment objectives. Mark spent time answering questions, and his associate offered nonprofit leaders an understanding of fiduciary responsibility in their roles.

This event was chronicled by Steve Sinovic in the Sunday, February 9, 2020 edition of the Green Valley News. Check out our updated website for that article and more!

Office News:

We've grown, thanks to you: Thanks entirely to personal recommendations from our clients and the other members of their team of trusted advisors, 2019 marked a year of significant growth for our practice. Linda Goode joined the team as a part-time administrative assistant to

help develop and expand personal and professional relationships. Emily is engaged to be married to a wonderful guy named Scott. Debra stays busy making quilts when she's not keeping the office in tip-top shape. We are profoundly grateful for the opportunity to serve several new families. We endeavor to continue to earn your trust and confidence as we move forward into the New Year and uncharted territory in the investment world.

Personal news:

Stevens Family update: Tammi & I celebrated our twenty second wedding anniversary in June with a three-state RV road trip with 4 of our kids. It was quite an adventure! In September we celebrated my mom's 80th birthday with family and friends - a milestone event! Our family spent the Christmas holiday in Flagstaff with my sister's family and both Tammi's mom and my mom. Great snow and fun family time.

Emma, 20, is a junior and thriving at Arizona Christian University (ACU). In addition to a full class load, she competes on the ACU swim team (go Firestorm!) and has qualified for the National Association for Intercollegiate Athletics (NAIA) Swim Competition in Knoxville! Funny story: While babysitting and tutoring in her "free-time," she learned she likes tutoring the science classes, so Biology is her major focus in school.

Grace, 18, is loving being at Grand Canyon University. Grace worked as a summer camp counselor in Sammamish, WA and loved it! She changed her major to Accounting, and as a junior, she could receive her degree days before her 20th birthday! Stay tuned... We are blessed when the girls are home during holidays and other school breaks, and I have been lucky enough to catch up with them for lunch or coffee visits in Phoenix when I get into the Big City.

Jacob, 16, is following in his sister's footsteps, graduating a year early and has signed on to Arizona Christian University (ACU) with a swimming scholarship! He swam again this year in the state championships for Walden Grove Swim Team and broke the school record for backstroke. Dad's proud here, too, and again thankful for my kids' mom's athletic genes. He recently became an Eagle Scout! For his project he built a Gaga ball pit at our church. It was fun to see all of the kids using it! We have to postpone celebrating his Eagle Scout Court of Honor. Nevertheless, it has been a fun experience to see him mature and become a responsible young man.

Holly, 14, is in 8th grade and will be in High School next year! Where does the time go? She loves spending time with her friends, swimming and painting. She is helpful and loving with the littles and is so much fun to be with.

Michael, 6, loves puzzles and books! He can read any three-letter word and tries to read everything he sees. He still loves to sing, and he has a new interest in telling jokes! They may not always make sense, but the concept is there. Like his dad, he likes to make people laugh.

Zachary, 5, loves to dress up and pretend. His latest favorite costume characters are "Bible Man" and Cowboy, complete with hat, bandana, chaps, boots and spurs! He is a great cuddler

and is also very chatty which can be very cute. He and Michael love to ride their bikes and are great playmates.

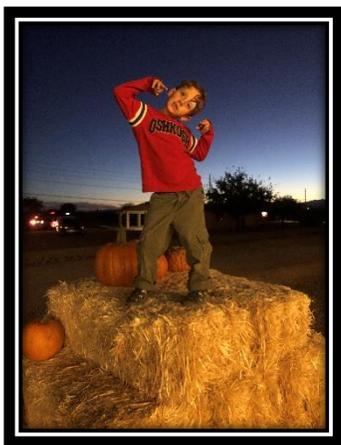
Tammi is still going gangbusters with her home school co-op, Loving To Learn. The group put on a Medieval Feast in the fall that drew nearly 150 people to our house and yard. Classes are all online, now, and she is getting good at facilitating lessons with her group. Tammi is also still putting up with me after all these years.

I, **Bill**, had a part in "Jingle Jam," a comedic Christmas drama at Grace Church of Sahuarita. My best mornings start out with a great workout or bike ride through our beautiful mountains. When I was working out at CrossFit, I was one of the older guys in the class. Now when I work out at Green Valley Recreation Fitness Center, I look like a young stallion!

We had many reasons for gratitude in 2019, and we are confident that together we can work through this time of unprecedented uncertainty. May you be blessed this year with good health, good cheer, and especially gratitude for the many blessings that we have as Americans, along with the silver linings we're discovering during this unusual time in history.

You were probably wondering when you could read the regulatory disclosures. Well, wait no longer!

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Fall Festival Fun



These kids need my attention!



My Family – close as ever!



Jacob makes Eagle Scout



Colonial Gentlemen



22 Years Blessed!