EUSTACE ADVISORS

Client Newsletter – May 2023

ADVISOR'S PERSPECTIVE

Ongoing market and current events may cause concern from a personal financial planning perspective – I encourage clients to let their Investment Policy Statement and Financial Plan dictate their actions and to sustain a long-term investment outlook.

NEW RESOURCES AVAILABLE

1. Website: Our website update is now live and offers numerous enhancements including an Advisor Insights page. Recent Advisor Insights have covered the Value of Time in Investing, and Ideas on How to Start Investing.
2. Education Services: updated classes on (1) Balance Sheets and Income Statements, (2) Budgeting, (3) Life Insurance, (4) Fundamentals of Estate Planning and (5) An Introduction to Investing are now available.
3. White Papers: "How to Build a CD Ladder" and "Understanding Mutual Fund Capital Gains" were recently released.

Please let me know if you have suggestions for topics to address in white papers and Advisor Insight posts.

Q2'23 SERVICE CALENDAR TOPICS

APRIL: INCOME STATEMENT & BUDGET

I posted updated Income Statements for all clients on their secure Google Drive in the Financial Plan and IPS folder. We will refer to this during upcoming discussions.

APRIL: INSURANCE

The Insurance update is late and will be posted by May 31 – I apologize for the delay. The focus will be on life insurance.

MAY: ESTATE PLANNING

Eustace Advisors will provide information related to estate planning. An overview of the estate planning process and key terms will be the focus.

JUNE: INSURANCE AND ESTATE PLANS - INDIVIDUAL CLIENT REVIEWS.

I will be in touch in June to schedule one-on-one reviews. My focus will be your insurance coverage and estate plan as part of your overall financial plan.

KEY UPCOMING DATES

JUNE 15: 2nd Estimated Tax payment for 2023 is due.

SEPT 15: 3rd Estimated Tax payment for 2023 is due.

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