



THIRDLY

APRIL 2024



2024

Wardrobe Change

Welcome!

BY JOE CLARK

Welcome to the Thirdly. An event designed for communication, collaboration, and community. Financial Enhancement Group, LLC was built on the bedrock of our core values - Caring, Committed, Collaborative, Driven, and Adaptable - and the promises to say please and thank you, show up on time, and do what we say we will do.

Within two years of starting the firm, we were beginning to fail, which wasn't acceptable. We had every intention of meeting with everyone each year, but our growth rate of new families outpaced our ability to hire and train professionals. So we created a group meeting throughout the year and bought dinner. Communication and Community are pillars, hence the Thirdly was born.

The Thirdly existed before our weekly Market Carver and Elements in Focus as our best effort to communicate clearly and consistently. Now that technology allows weekly communication, the Thirdly events are held in multiple locations and virtually twice a year.

Community is essential to FEG. We don't have employees; we have team members. We don't have clients; we serve families. You are one of those critical families, and it is our honor to help you on your financial journey. This Thirdly will keep you updated on the recent issues impacting the economy, markets, and tax code relating to your financial journey. **Welcome, and please enjoy! This is for you.**

WHAT'S IN YOUR WARDROBE AND IS IT CHANGING?

SPEAKER JOSEPH A. CLARK, CFP®

- Are changes and innovations here to stay or a passing fad?
- Where the baby boomers have been, are now and where they are headed?
- Who is coming next to replace the generation of boomers?
- Why continuity is a major priority for FEG Families.



QUESTIONS & NOTES:

"If you don't know where you're going, any road can get you there."

-Lewis Carroll

TEAM GROWTH & PLANNING UPDATES

SPEAKER AARON RHEAUME, CKA®

Our team continues to grow, and with that comes more support. FEG now has fourteen Financial Advisors and nine Paraplanners.

With growth comes additional ideas to improve the financial planning for our families. Stay tuned in this session, we will be covering some exciting updates!

AS A REMINDER, SCHEDULING A MEETING IS NOW EASIER WITH OUR NEW SCHEDULING TOOL. BOOK A MEETING WITH YOUR ADVISOR VIA THEIR PERSONAL CALENDAR LINKS!



QUESTIONS & NOTES:



WHERE HAVE WE BEEN & WHERE ARE WE GOING

SPEAKER ADAM HARTER, CFA®

LET'S GET INTO THE DETAILS!

Private Markets vs. Public Markets

- It is a part of our evolution and trend investors need to consider what this means.
- What did private used to mean?
- Big trends have changed things and the results!
- What we do about it & important differences.

Election Year and Sentiment

- Seeing red or feeling blue?
- Separating reality from rhetoric.

QUESTIONS & NOTES:



GOT QUESTIONS

SUBMITTED FROM OUR FAMILIES

Question: Election year effect on the markets.

Question: Upcoming recession potential & related planning.

Question: Upcoming changes to the tax code-- rate changes and such.

“COME MOTHERS AND FATHERS THROUGHOUT THE LAND, AND DON'T CRITICIZE, WHAT YOU CAN'T UNDERSTAND.”
BOB DYLAN'S FAMOUS 1964 SONG “THE TIMES THEY ARE A-CHANGIN'.”



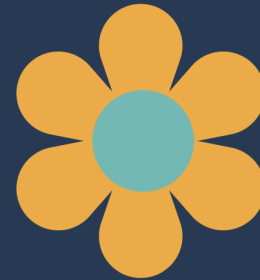
TAKEAWAYS:

»» STAY ENGAGED!

You Are Family



FINANCIAL
ENHANCEMENT
GROUP, LLC



FEG Trust Services is ready to help you with your Legacy Planning.



FEGTrust.com



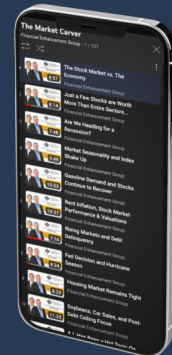
Did you know your children have access to FEG at your rate and without the the minimum level of assets?

Text them our link, and have them schedule their **Next Steps Meeting**.

Our team will handle it from there!

YourLifeAfterWork.com

Subscribe on YouTube for our weekly Market Carver and Elements in Focus videos.



@FinancialEnhancementGroup



FROM OUR FAMILY TO YOURS, THANK YOU!



Financial Enhancement Group is an SEC Registered Investment Advisor