

MATTHEW NEWMAN EVENT - DOWNTOWN HARVARD CLUB BOSTON (DECEMBER 2018)

On occasion a person will come along that reminds us of the important things in life. We had the privilege of working with our corporate sponsor Will Banning of Transamerica, to have Matthew Newman, a brain cancer survivor, father, husband, and author speak at an intimate private event, held at the Harvard Club on December 11th, 2018.

Matthew's book "Starting at the Finish Line" is an inspirational story of courage and the importance of planning in life. Matt was kind enough to share with us his story of survival and planning and how he was able to focus his energies on his recovery. We want to thank Transamerica for sponsoring this event and our clients, friends and family who were able to attend. Lastly, we want to thank Matt for reminding us that living in the moment is a lost art that we all need to incorporate back into our lives.

you can purchase Matt's book, "Starting at the Finish Line" on Amazon



INVESTOR BEHAVIOR EVENT (OCTOBER 2018)

With the market fluctuations and elections drawing near, we wanted to have an event that focused on discussing the methodology behind our investment models as well as investor behavior. We worked closely with our partners at Fidelity and American Funds to provide expert knowledge with guest speakers, Jake Weinstein, and Webb Heidinger. They spoke about the investment cycle, the business cycle, the emotions of investing, what to do and better yet what not to do.

We hope this event, at the Needham Sheraton, was not only enjoyable but also informative for those who attended.

TAX REFORM EVENT (FEBRUARY 2018)

As the new tax bill got passed by President Trump, we knew it would generate a lot of questions like, "how does this affect me?" We felt that it was important to host an event on this topic and wanted to tackle the challenge a little differently this time. We constructed a panel of professionals to help answer your questions and shed some light on the bill. Paul Marchesiani, CPA, from the accounting firm Marchesiani and Provanzano, Herb Daroff, J.D. from Baystate Financial and Chris Palladino, CFP, ChFC, Director of Advanced Strategies from Jackson National, were our guest speakers for this event.

This event was hosted at the Needham Sheraton, and we want to thank our speakers for providing their time and knowledge to us and our clients. Based on the feedback that we received, our panelists shared a wealth of information with us and helped us to understand how these changes affect us both personally and professionally.

As always, we look forward to seeing you at our next event.