BostonWealth STRATEGIES

Your Financial Journey. Our Expertise.

Let's face it, the first half of 2022 has not been the best from a financial perspective. Inflation has been around 8% for some time, empty shelves are becoming the norm, and your investments may have dropped in value. So what can you do?

The bad news is that you have no control over what inflation, interest rates, or market returns will be in the future. The good news is that jobs are plentiful and we have learned how to live with the pandemic. So, with summer in the air, let's focus on what we can control to improve our financial situation. Here are some ideas you can implement during your summer weekends, maybe with a smoothie or a margarita nearby.

Quarterly Market Update

Stay up to date on the economy and markets with perspectives from Brad McMillan and other members of Commonwealth's Investment Management and Research Team.

Market Update - Quarter Ending 06/30/2022

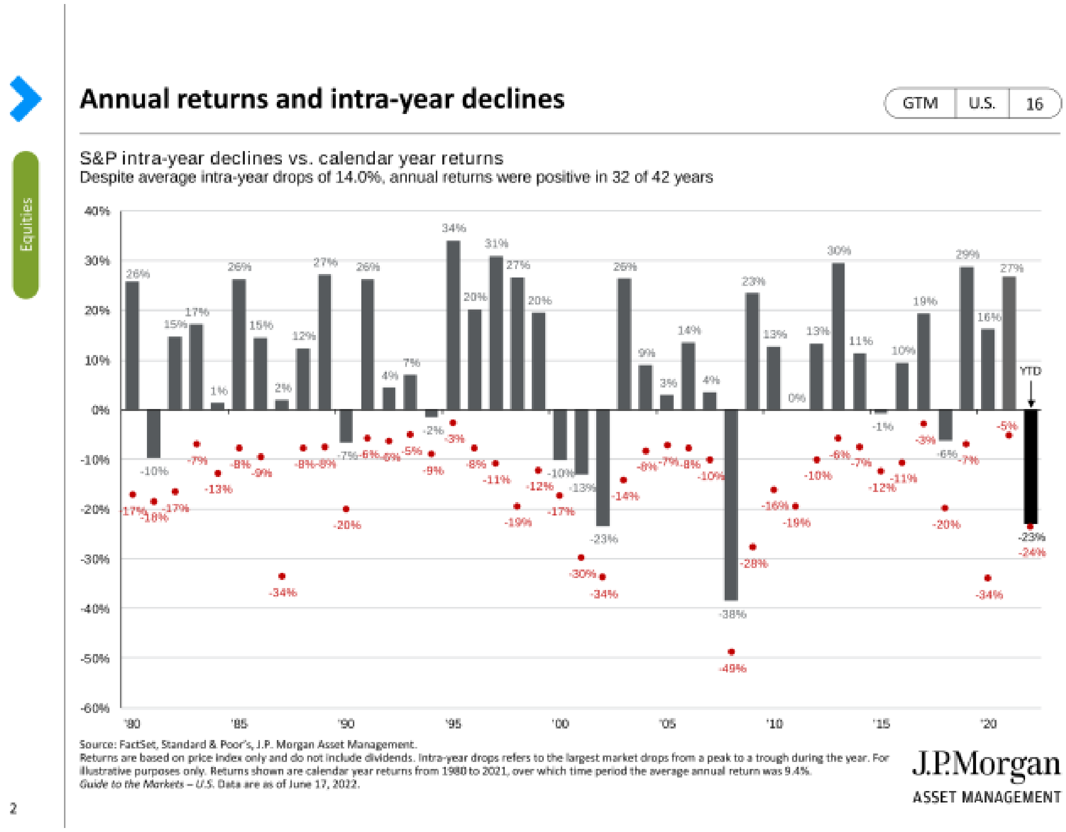
Learn More

Investment Management

A message from our CIO, **Jason Edinger, CFA**

The chart below displays the greatest intra-year market declines (negative red numbers), contrasted with the market's end-of-year return as of December 31st (gray bar).
It is clear to see that the market often recovers from large intra-year drops to finish the year in positive territory. We see that occurring in 32 of the 42 years displayed on this chart. This is a good reminder that in the majority of cases, investors should stay the course. When the market gets volatile the hope is to avoid the behavioral mistake of locking in losses at market lows, only to miss all the gains in the subsequent recovery.

Click this link to access the chart
JP Morgan Guide to the Markets



Retirement Services

Are you a plan sponsor, retired, or retiring soon?

Click below to learn about the Secure Act 2.0 possible updates that can effect you.
Click here to learn more!

Financial Planning

How can a financial plan help you during these uncertain times?
Click here to learn more!

Stay on Track: 10 Tips for Midyear Financial Planning
Click here to learn more!

Learn More

What's Happening at BWS?

Welcome Erik!

Erik Fyrer joins Boston Wealth as an advisor with experience in managing investment accounts. His desire to join Boston Wealth stemmed from his need to know his clients better. This aligned perfectly with our values, which is why we know he will make a great addition to our team.

Visit our **website** to learn more about Erik or click here to send him a welcome **email**.

Welcome Grace!

Grace Sun first joined Boston Wealth as an planning intern. She went on to prove herself to be a quick learner and very driven about her career, which is why she was a perfect fit after graduation to become our firm's Paraplanner. She focuses her efforts on aiding the advisors and our Planning Director in clients' financial planning needs.

Visit our **website** to learn more about Grace or click here to send her a welcome **email**.

Our New Planning Email is Live!

We not only look forward to client feedback, but we also listen to it! Our planning email has been set up to provide you with one point of contact to address your financial planning questions. This email will be monitored weekdays from 8am - 5pm and a reply will be provided within 24 hours of receipt.

Save the email **bws@planning.com** and we look forward to hearing from you.

Shredding Event - (Held June 9th)

We were so glad so many of you could take advantage of this event and rid yourself of those old documents. We want to thank Fidelity for their support in sponsoring our event and thank all of you who attended. We look forward to seeing you at the next event!

In addition to our **LinkedIn** page, Boston Wealth Strategies is now on **Facebook!**
Make sure to like and follow us to stay up to date with our latest content.

Contact Us

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