

NEWSLETTER
June 2026

As summer officially began, there was a natural shift toward community, celebration, and making the most of time with the people who matter most.

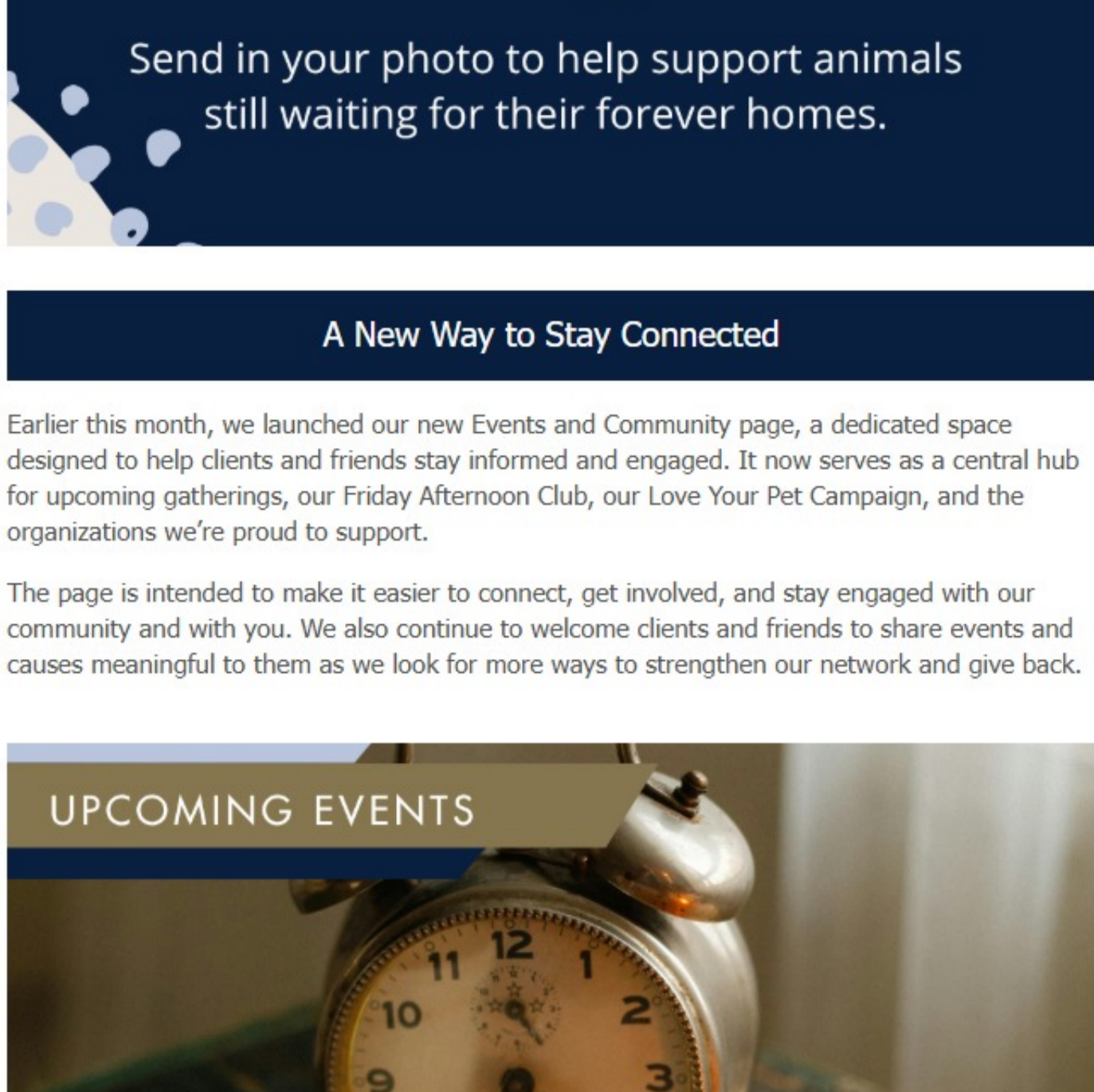
We leaned into that spirit with a few meaningful updates. We launched our new events and community webpage to help you stay connected, we expanded our team with the addition of a new administrative support specialist, and, in honor of Father's Day, shared a special glimpse into Hugh's golf trip with his dad and brother—a reminder of the moments that matter most.

Here are a few highlights to keep you informed, inspired, and enjoying the start of summer.

Your Pet Could Make a Difference

The Love Your Pet Campaign is back for year three, and the submissions have been incredible! Haven't shared yours yet? There's still time to send in your favorite pet photo and be part of something meaningful. Every photo helps us give back to animals in need.

Send us your favorite pet photos [HERE](#) or you can submit through our community page [HERE](#).

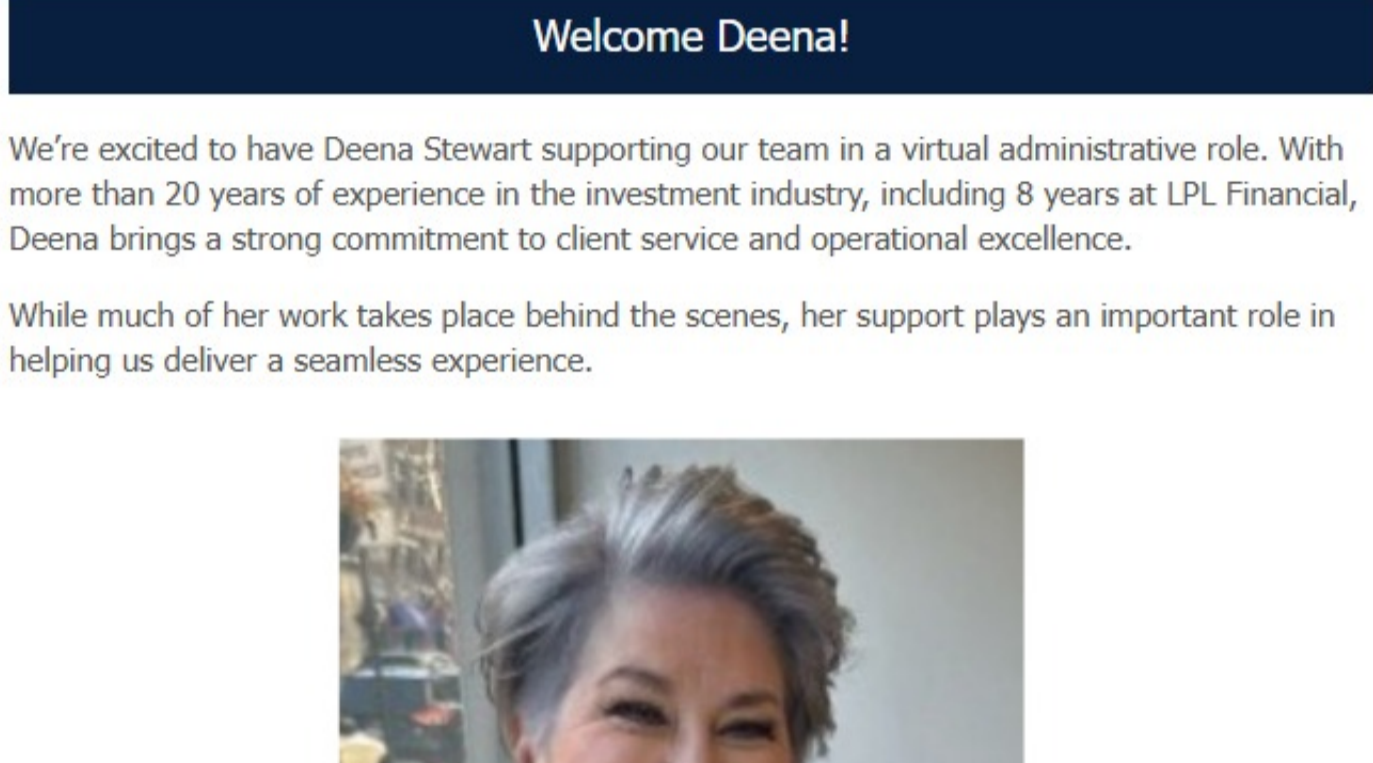


Send in your photo to help support animals still waiting for their forever homes.

A New Way to Stay Connected

Earlier this month, we launched our new Events and Community page, a dedicated space designed to help clients and friends stay informed and engaged. It now serves as a central hub for upcoming gatherings, our Friday Afternoon Club, our Love Your Pet Campaign, and the organizations we're proud to support.

The page is intended to make it easier to connect, get involved, and stay engaged with our community and with you. We also continue to welcome clients and friends to share events and causes meaningful to them as we look for more ways to strengthen our network and give back.



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Welcome Deena!

We're excited to have Deena Stewart supporting our team in a virtual administrative role. With more than 20 years of experience in the investment industry, including 8 years at LPL Financial, Deena brings a strong commitment to client service and operational excellence.

While much of her work takes place behind the scenes, her support plays an important role in helping us deliver a seamless experience.



Deena Stewart is an employee of LPL Business Solutions, a service that provides industry-trained LPL professionals who can help simplify operations and streamline LPL advisors' practices.

Stepping Back to Connect

A recent golf trip to Colorado Springs gave Hugh the chance to spend time with RB and Brooks and unplug from the usual routine. With Father's Day having just passed, it served as a good reminder to prioritize time with family.

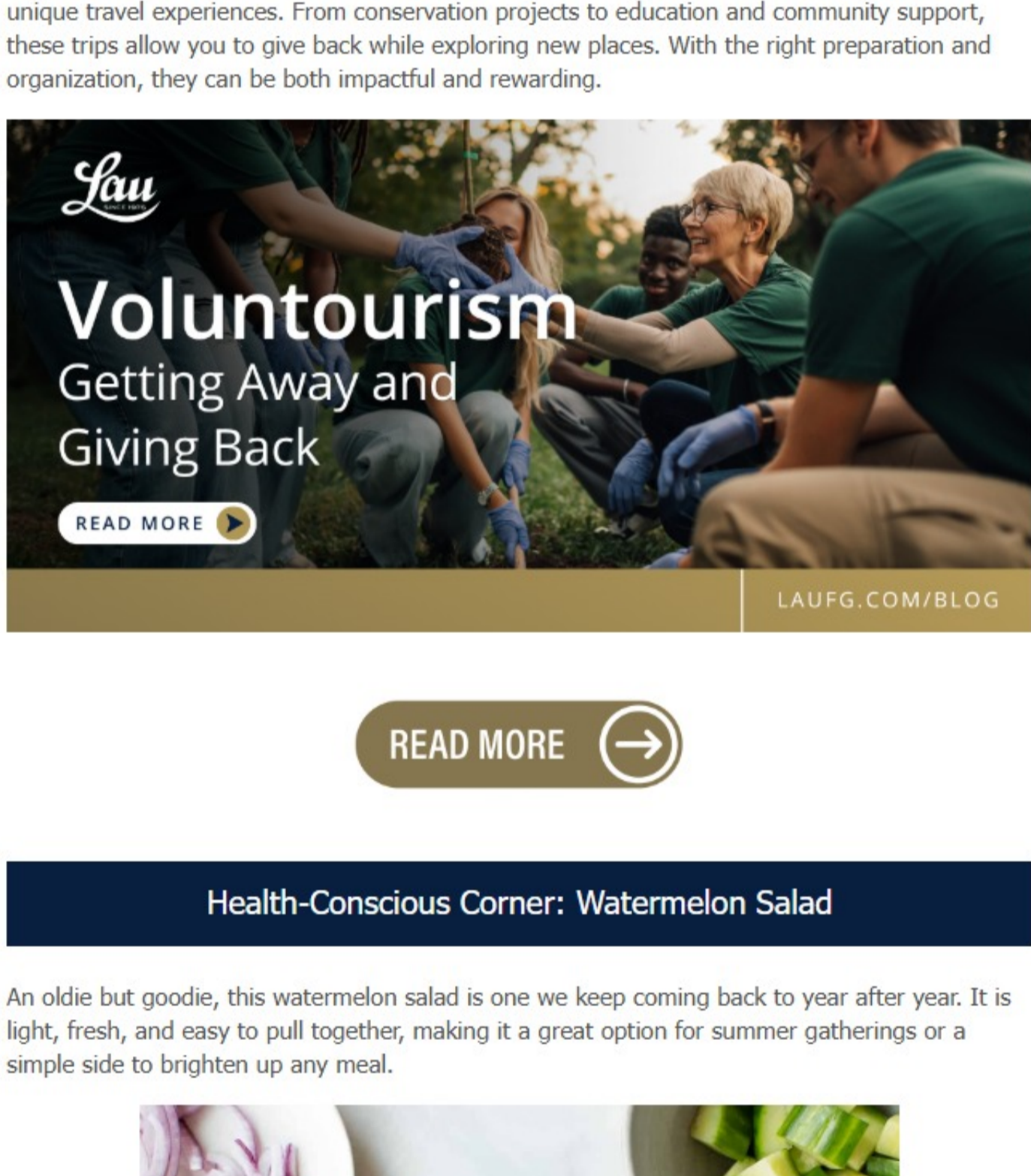
It's a simple idea, but one that also shows up in planning and making room for what's important, not just what's urgent.



Friday Afternoon Club Resumes in September

As a reminder, we pause for the summer months in July and August.

Friday Afternoon Club will resume on **September 4** to kick off Labor Day weekend at the Kreitmans' acreage—more details to come.



FRIDAY AFTERNOON CLUB

Visit us on the first Friday of every month between 11 AM and 1 PM.

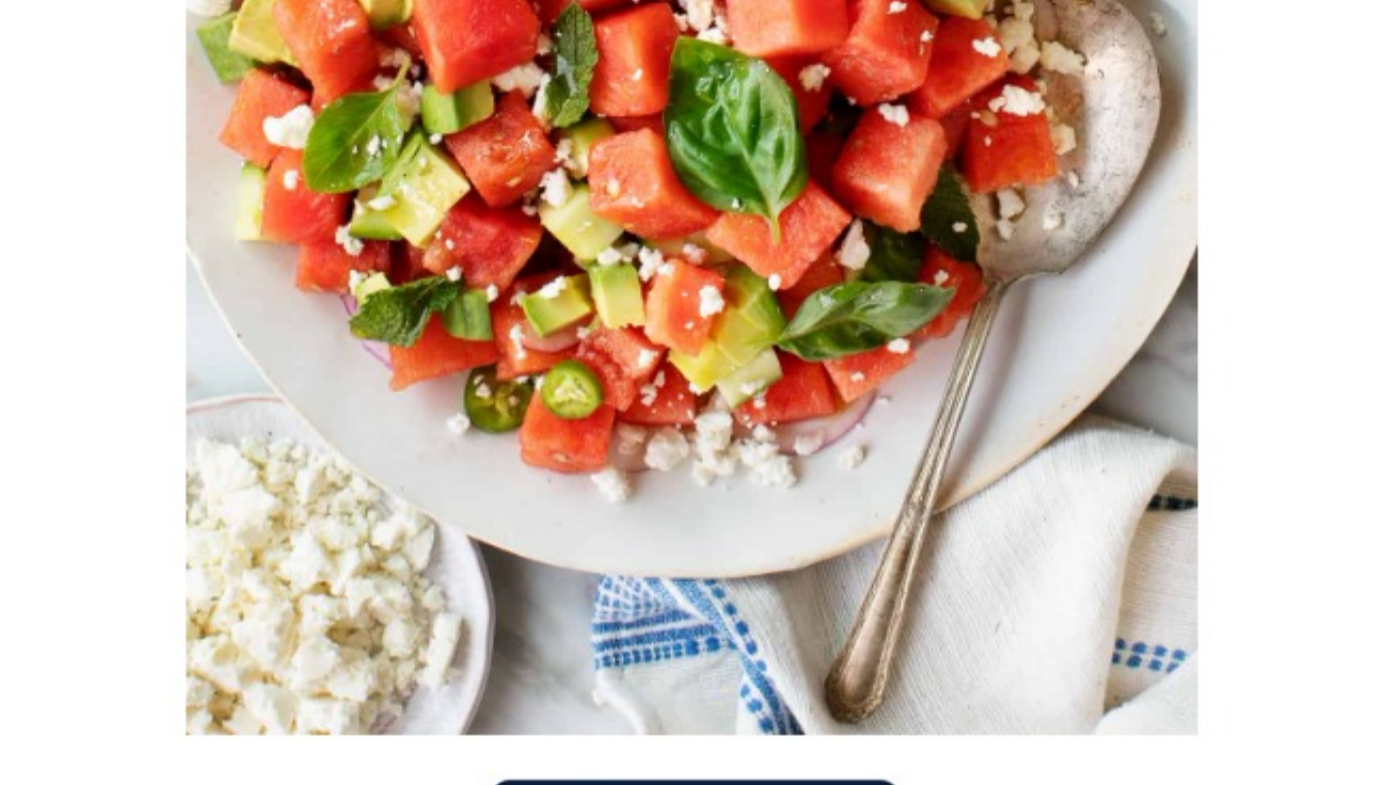
OUR NEXT FAC IS: SEPTEMBER 4, 2026

We would be thrilled to have you come and meet with us! Come enjoy a delicious meal, dessert, and great conversation!

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Travel with Purpose

Volunteer vacations offer a different way to see the world by combining meaningful service with unique travel experiences. From conservation projects to education and community support, these trips allow you to give back while exploring new places. With the right preparation and organization, they can be both impactful and rewarding.



Voluntourism
Getting Away and Giving Back

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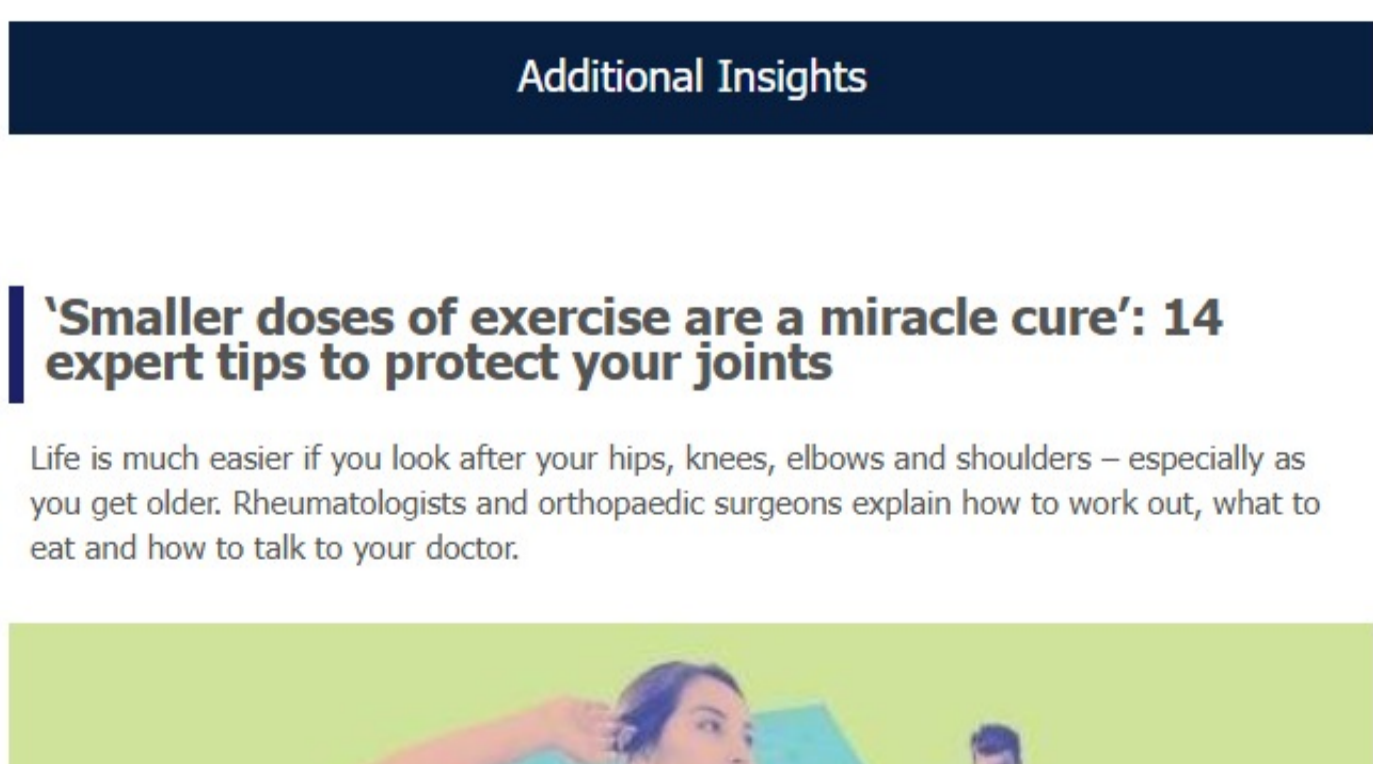
Health-Conscious Corner: Watermelon Salad

An oldie but goodie, this watermelon salad is one we keep coming back to year after year. It's light, fresh, and easy to pull together, making it a great option for summer gatherings or a simple side to brighten up any meal.



[Get the Recipe](#)

50 Years, 50 Stories. A Year of Celebration.



CELEBRATING 50 Years

TEAM SPOTLIGHT

In Their Words

“Everything we do is to help our clients feel more secure, calm, confident and comfortable with their financial situation.”

Hugh Lau, CIMA®, Managing Director

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As June wraps up, we hope you're finding your rhythm for the season and making time for whatever summer looks like for you.

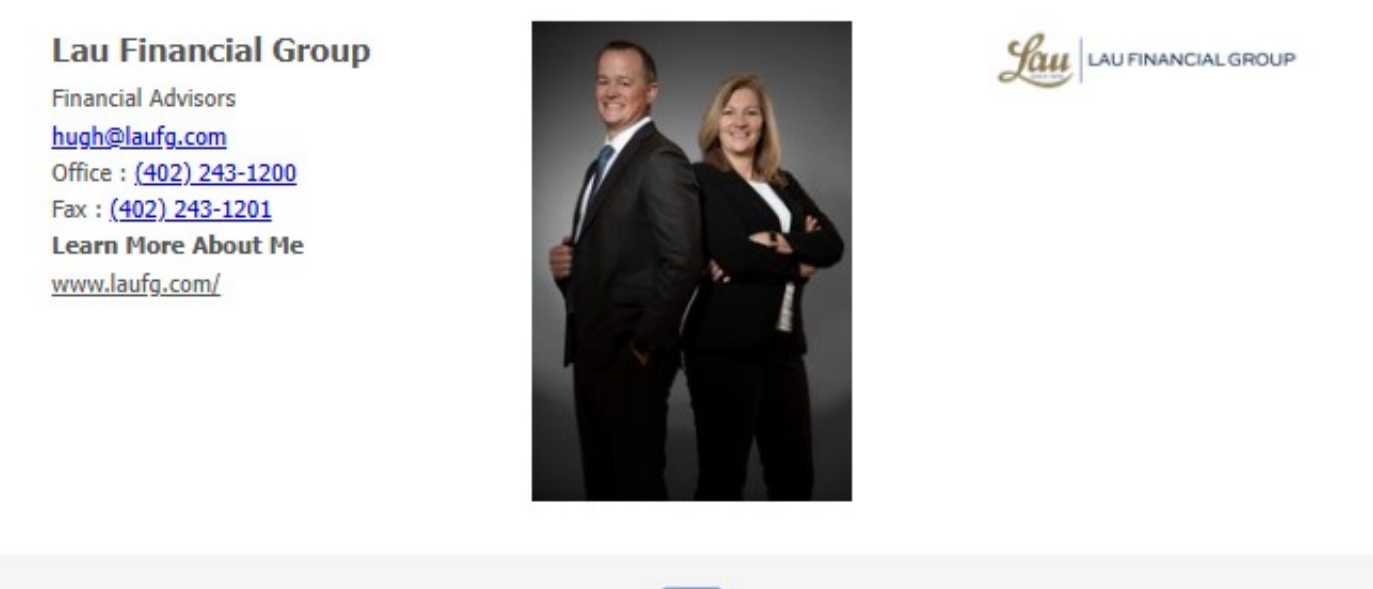
Kind regards,

Hugh and Jack

Additional Insights

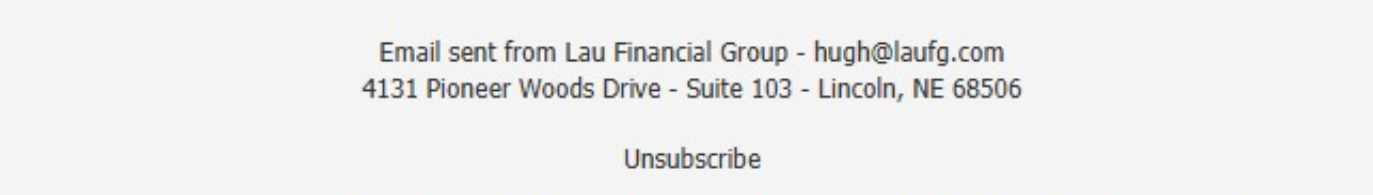
'Smaller doses of exercise are a miracle cure': 14 expert tips to protect your joints

Life is much easier if you look after your hips, knees, elbows and shoulders – especially as you get older. Rheumatologists and orthopaedic surgeons explain how to work out, what to eat and how to talk to your doctor.



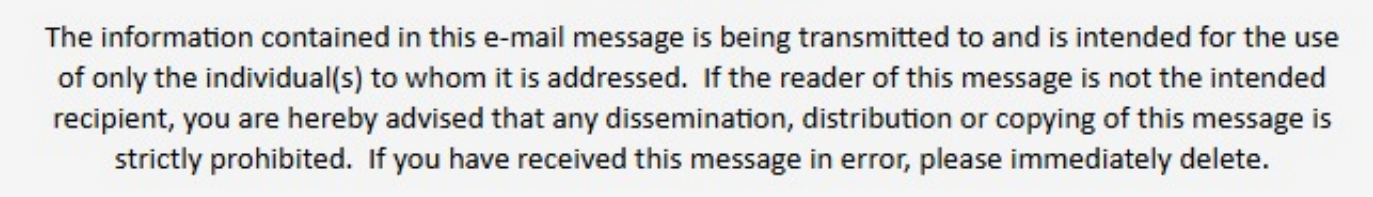
A Midyear Tax Checkup May Help Manage Unwanted Tax Consequences

A midyear tax checkup allows you to identify and address any tax issues or execute any planning opportunities.



Do You Want To Live To Age 100?

As you age, you might consider a more refined and personalized longevity goal that reflects your life experience.



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