

BOGGS & COMPANY

WEALTH MANAGEMENT

BUILDING OPPORTUNITIES GUIDING GENERATIONAL SUCCESS



MONTHLY FEATURES

PAGE 2

Feedback Survey

PAGE 3

Forbes Best-In-State
Memorial Day
4th Annual Gatsby Gala

PAGE 4

YouTube: Boggs Briefing
Mother's Day

PAGE 5

Ty Johnson's Football Skills Camp
May Birthday Celebrations



Welcome to May! This month, we're doing things a little differently—**we need your input!** Your insights are invaluable in helping us continue to provide the best financial guidance and services, so we're asking for your feedback through a brief survey.

You can complete the survey in the newsletter and send it back through the mail (return envelope enclosed!) or conveniently scan the QR code to submit your responses online. The more feedback we receive, the better we can tailor our approach to serve you and our community. We truly appreciate your time and look forward to hearing from you!

HELP US IMPROVE!



Tell us what you think! Please complete the form below and return it by mail, or scan the QR code to submit your feedback online.

Name: _____

Address: _____

Email: _____

Phone #: _____

1. What topics would you like to see covered in our future newsletters? *(Select all that apply)*

- | | | |
|--|--|---|
| <input type="checkbox"/> Retirement Planning | <input type="checkbox"/> Budgeting and Saving | <input type="checkbox"/> Other (please specify) |
| <input type="checkbox"/> Investment Strategies | <input type="checkbox"/> Market Trends and Updates | _____ |
| <input type="checkbox"/> Tax Optimization | <input type="checkbox"/> Insurance | _____ |
| <input type="checkbox"/> Estate Planning | <input type="checkbox"/> Trusts | _____ |

2. What type of events would you be most interested in attending? *(Select all that apply)*

- | | |
|--|---|
| <input type="checkbox"/> Webinars or Online Workshops | <input type="checkbox"/> Exclusive Investment Briefings |
| <input type="checkbox"/> In-Person Networking Events | <input type="checkbox"/> Other (please specify) |
| <input type="checkbox"/> Seminars or Educational Talks | _____ |
| <input type="checkbox"/> Client Appreciation Events | _____ |

4. What additional feedback or suggestions do you have to help us improve newsletter content? *(Please feel free to share any ideas or comments)*

5. How can we improve your in-office experience? *(i.e., What do you wish we did?)*

6. What is meaningful/relevant to you in your financial life, or in your relationship with Boggs and Company?



IN CASE YOU MISSED IT



Forbes

BEST-IN-STATE WEALTH ADVISORS

SHOOK RESEARCH

2025



Larry was once again recognized by Forbes/Shook Research as one of the Best-In-State Wealth Advisors for 2025! Congratulations on this wonderful accomplishment!



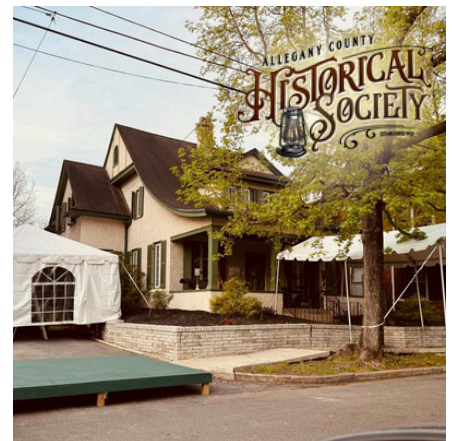
In honor of **Memorial Day**, our offices will be closed on **Monday, May 26** as we take time to reflect and remember those who have served and sacrificed for our country. We hope you have a meaningful and restful holiday. **Normal business hours will resume on Tuesday, May 27.**

Boggs and Company Proudly Sponsored the 4th Annual Gatsby Gala

Last month, the Brooke Whiting House transformed into a dazzling 1920s celebration for the **Gatsby Gala**, a cherished event honoring Cumberland's rich history. As a **Colonial Heirloom Sponsor**, Boggs and Company was proud to support this evening of vintage elegance, fine dining, and lively entertainment.

Guests dressed in their best Roaring 20s attire, reliving the glamour of Prohibition-era soirées while surrounded by the remarkable art and antique collections of Brooke and Anne Whiting. Proceeds benefited the **Allegheny County Historical Society**, furthering its mission to preserve and share local history.

We are honored to have been part of this special event and appreciate the community's continued support!



»»»» IN CASE YOU MISSED IT »»»»

CATCH UP ON THE LATEST FROM BOGGS

Join Us On YouTube!



[YouTube.com/@BoggsandCompanyWM](https://www.youtube.com/@BoggsandCompanyWM)



Get the Scoop from Our Advisors with the Boggs Briefing

NEW! Our advisors bring you professional market commentary and cover key financial topics to help you navigate the ever-changing economic landscape. Whether it's investment insights, retirement planning information, or the latest market trends, The Boggs Briefing keeps you in the know.

📱 Scan the QR code to subscribe or visit us at [youtube.com/@BoggsandCompanyWM](https://www.youtube.com/@BoggsandCompanyWM) to start watching today!



Honoring Mothers This May

This month, we celebrate and thank the incredible mothers who inspire, guide, and uplift those around them. Your love, strength, and dedication make the world a better place. From all of us at Boggs and Company, we appreciate you today and always—**Happy Mother's Day!**

Come and Be a Part of Our Community!

From local events to impactful projects, our **Community**

Engagement website page showcases the spirit that unites us.

Explore our community initiatives and ask yourself how you can get involved!



Scan QR Code

IN CASE YOU MISSED IT

Teaming Up for a Stronger Community

Boggs and Company Wealth Management is proud to support Ty Johnson's Football Skills Camp, an initiative that helps young athletes sharpen their talents and build confidence on the field. As an annual sponsor, we are committed to investing in programs that empower future generations.




Recently, Ty gathered his \$1,500 camp sponsors for a special dinner at Lakeside Grill @ Rocky Gap to celebrate their continued support. It was an evening of great company and shared commitment to helping young athletes thrive. Among those in attendance were Joanie & John Whitman, Larry Boggs, and representatives from Sonny's Transfer Moving & Storage.



At Boggs and Company, we believe in making an impact—on and off the field. Supporting this camp is just one of the many ways we work to strengthen our community.

Birthday Cheers to Ed and Chris!

Spring brings warmer weather, blooming flowers—and birthdays for Ed and Chris! We won't reveal how many candles are on their cakes, but we will say that we are lucky to have them on the team. Join us in wishing them both a fantastic birthday and another great year ahead!



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