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Fall Newsletter 2014

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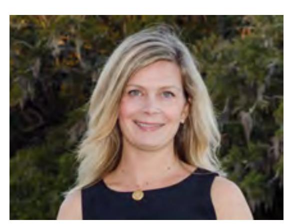

Dear Friends, Clients and Colleagues,

Now that another summer has sped by, I've been thinking a lot about investing and time. It is so easy to get caught up in the day-to-day acntics of markets and lose sight of the longer-term. Do you remember the story of Rip Van Winkle, who fell asleep for 20 years? Sometimes I think we might all be better off as investors if we could "fall asleep" at least to our investment portfolios. See what would have happened to Mr. Van Winkle's $100,000 investment after the best and worst 20-year market periods from 1926-2013.

The wisdom of time also puts periodically "hot" commodities like gold into perspective. As you will see from the short, humorous video below, when it comes to investments, all that glitters isn't gold.

And although estate planning isn't at the top of our list of fun things to do, it needs to be at the top of our must-do list. Here are five things to remember. For those of you looking for a good read, here is a list of the top 10 business books to read this fall….there is something on the list for everyone.

Please don't forget to view our new CIA Corner section where we will keep you up to date with our business initiatives and other noteworthy nuggets of news!

Best,
Stephanie

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Articles of Interest

What if Rip Van Winkle Invested in The U.S. Stock Market? What would happen to your investment portfolio if you fell asleep for 20 years?

Video! Financial Follies: Gold Check out this short, animated video (someone has been watching a lot of Loony Tunes) that looks at the performance of Gold vs. U.S. stocks over the last 211 years.

Best Business Books to read this fall Coming out in the next two months are memoirs packed with advice, like Virgin Group founder Richard Branson's "The Virgin Way: Everything I Know About Leadership;" post-recession financial analysis, like Martin Wolf's "The Shifts and the Shocks: What We've Learned — and Have Still to Learn — from the Financial Crisis;" and useful professional guides, like Steven Pinker's "The Sense of Style: The Thinking Person's Guide to Writing in the 21st Century."

Five Estate Planning Tasks That You Shouldn't Put Off Tackle these five critical tasks and make sure they stay up to date.

CIA Corner

- Learn more about our latest initiative The Legacy of Care in our press release. Our goal is to expand our financial planning capabilities beyond traditional families to help navigate the nuances of planning for families with special needs children. Click to view Press Release.
- Congratulations to Donald who was recently honored with University of South Carolina 2014 Distinguished Alumni Award recipient. He will be honored for his achievements during Homecoming Weekend, October 17-18.
- It's never too early to start thinking about taxes. If you need to harvest gains or losses in your portfolios please don't hesitate to give us a call.

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