

Hoping all is well with you and yours! We're writing to inform you that **October is National Financial Planning Month**, and instead of sending the typical "here's what to do with your money" email, we want to first express our gratitude that you've chosen to entrust us with two of the most important parts of your life: your finances and planning for your future.

Of course, no matter what month it is- we're here to offer guidance on investments, insurance, retirement, college savings, taxes, estate planning, and beyond. More than all of this, we're here to help you pivot when life throws a curveball, providing personalized and accurate financial information so you always remain in control of your financial future.

At RFG, October is the start of our Q4 Proactive Reviews. It's the time of year where we take a deep dive reviewing and confirming the goals of your holistic financial plan to ensure we help you "Live for Today. Prepare for Tomorrow. Plan For Life."! We assess whether we are still on track to meet your goals, or if any adjustments need to occur. Please be on the lookout for an email from your advisor discussing the health of your plan.

Let us know what you may need from us and know we will always make ourselves available to you.

Sincerely,

Your RFG Family

The Rosselot Financial Group

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