



July 2024

Packing your bags for a summer vacation? This month we share tips for those planning an international trip so you can protect your finances while enjoying your overseas adventure. For those thinking about retirement, we provide a few considerations to help decide if you're ready to make this life transition.



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As always, know that as you continue on your financial path, we are here to guide you. We encourage you to reach out to your advisory team with any questions.



Secure Your Next Adventure: Why Travel Insurance Shouldn't Be an Afterthought

Whether you're traveling solo or in a group, independently or on a tour, Wealth Advisor Susan Chesson explains why you should consider adding travel insurance to your packing list.

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Are You Ready to Retire? 4 Questions to Consider

Many individuals approaching retirement are struggling with the question, “Am I ready to retire or should I continue working?” Wealth Advisor Bethany Ketron shares key points to consider when making this important decision.

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How Much Cash Should You Hold in Your Portfolio?

Chief Investment Officer Kevin Grogan provides insight into a common question from investors – what's the right amount of cash to have in my portfolio?

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