

## Welcome To Our First Issue!



So much information crosses our desks every day—news, financial insights, tips for improving operational efficiency, and more—and we frequently find ourselves wishing that we could share some of the highlights with our clients and friends.

“The Advanced Connection” is designed to coalesce and share tidbits of information that we hope you will find useful. If you do not wish to receive a copy, please email us at [info@advwealth.com](mailto:info@advwealth.com) to opt out.

We welcome your comments and suggestions as we continue to create future issues. Enjoy!

## Going Paperless | Operations Corner

### **Q: Can I stop all these statements from coming to me by mail?**

**A:** Yes! You have the option to stop not just paper statements, but also paper confirms, shareholder reports, customer correspondence, and/or tax documents.

Just follow these steps:

1. Log into your Investor360°® account. If you don't have one yet, or you can't remember your login information, please give our office a call. It only takes a few minutes for us to reset your password, or to set up your account and help you get started.
2. Click the Settings button in the upper right of the screen.
3. Scroll down until you reach Paperless Preferences.
4. Make sure that each account has an email address listed, so a notification can be sent when new documents are ready for viewing.
5. Click the box for each type of document you wish to be e-delivered. Any items which remain un-checked will continue to go to you by mail.
6. Repeat step 5 as desired for each account listed in your household.
7. Don't forget to click Save!

### **Q: What am I supposed to do with all this paper I already have?**

**A:** Let us help you get organized. If you don't have access to a paper shredder at home or work, please feel free to schedule a time to stop by our office and drop off your old statements. Don't risk identity theft by simply recycling or throwing them in the trash!



Check out the May issue of Portland Monthly Magazine. Our prestigious advisors are listed as recent winners of the 2015 Five Star Wealth Manager<sup>SM</sup> Award.

Portland Monthly and Five Star Professional partnered to find Portland area wealth managers who satisfy 10 objective eligibility and evaluation criteria, including: minimum of 5 years as an active credentialed financial professional, favorable regulatory and complaint history, fulfillment of firm's internal review, accepts new clients, client retention rates, client assets administered, number of client households, education and professional designations. The award is not indicative of the wealth managers' future performance. For more information please visit [www.fivestarprofessional.com](http://www.fivestarprofessional.com).

## Office Closures

Labor Day  
September 7th

Thanksgiving  
November 26th

Christmas Day  
December 25th

New Year's Day  
January 1st



## Two Things in Life are Certain | Bob Haley

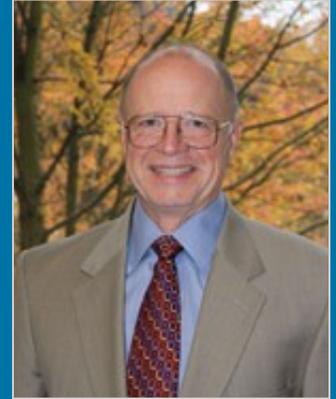
There is an expression that there are two things in life that are certain – death and taxes.

I believe this is not a true statement. Not everyone pays taxes.

However, there still are two things in life that are certain – death and ... uncertainty.

While good process increases the likelihood of a good result, it does not guarantee it. Yet we WANT certainty! We want for us and our families to stay healthy, happy and prosperous. Among other things we want our co-workers to be reliable and enjoyable. We want our politicians to be honest and competent. And we want to know that our financial and investment decisions will always be profitable.

But we cannot predict, much less control, the future. Every decision, down to where we place our feet as we walk, exposes us to uncertainty. We can, however, control our reaction to events as they unfold. If we can accept life's two certainties, and manage our expectations accordingly, then perhaps we can be less anxious about those things over which we have no control.



Connect with Bob



## Market Update | Ted Haley

2015 has been an eventful year in the financial markets so far! Stock and bond markets have been both up and down in fairly dramatic fashion, and we have seen the increase in volatility that we have been cautioning you to expect for several years now. The dramatic drop in the price of oil over the last year has sent waves through the markets, waves which have bounced off other interesting geopolitical events such as the nuclear negotiations with Iran, the near-exit of Greece from the eurozone and the last-minute (but temporary) resolution, and the dizzying rise and sudden fall of the Chinese stock market.

Here in the United States, the stock and bond markets are close to even with where we started this year, despite all the excitement. While markets in general are mostly flat, there is a small group of "popular" stocks that have done very well, and many people see this as a worrying sign. This article examines that theme in more detail: (<http://www.businessinsider.com/a-few-stocks-are-keeping-the-stock-market-a-float-2015-7>). We will have to wait and see what the rest of 2015 will bring, but we will be watching intently along the way! If you have any questions about the markets or your accounts, please be sure to give us a call.



Connect with Ted



## Meet the Team

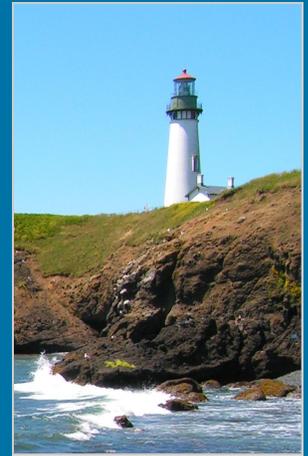


In addition to advisors Bob and Ted, our team is made up of a group of exceptional individuals, all with diverse educational backgrounds and a commitment to provide exceptional service.

The Operations Team includes Linda, our Vice President of Operations, as well as Operations Specialists Veronica, Becky, and Traci. They are usually the first point of contact when you call in to our of-

ice, and they help clients in a multitude of ways. Dorothy and Lindsey share the role of Business Manager, and work together on our internal business operations and development.

*Back Row Left to Right: Ted, Linda, Dorothy, Bob  
Front Row Left to Right: Lindsey, Veronica, Traci, Becky*



Click here to visit our website and learn more about our team members.

## Oregon Food Bank

In July our team volunteered at the Oregon Food Bank in Beaverton. Together with the other 35 volunteers there that night, we repacked 7,225 pounds of frozen corn and carrots into family-sized portions. Afterwards we took a tour of the facilities and learned about the organization's mission and the various opportunities to get involved in the effort to fight hunger.



We were surprised to learn that the Food Bank accepts donations from private gardens as part of their *Plant a Row* campaign (see this link for more information: <http://www.oregonfoodbank.org/give-food/plant-a-row-program>).



For updates on AWM activities, pictures, and more, check out our Facebook page!

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