August 2020

The News You Need to Know

Left to right: Andrew Woolley, Andrew Barninger, Christopher Miller, Steven Bell and Alan Loss.

A Change To Your Meeting Reminders

In an effort to keep our clients and team members healthy, we are meeting with you in a variety of ways. We're having virtual meetings, phone calls, conference calls, and the occasional in-person meeting when needed. Despite the many ways that we are communicating, our goal is to continue to make these meetings as valuable and helpful to you as possible.

One way that we want to do this is to hear from you before we meet. We want to know what is top of mind for you and what you want to discuss while we are together. Your input before our meeting will help us to better prepare and provide the best advice possible.

So, we are making a change to how we remind and contact you before meetings. Rather than receiving a reminder card in the mail, you will be sent an email. This email will confirm the date time and method of your meeting. It will also ask you to reply with your desired meeting discussion topics and questions. Your response will be sent to your advisor who will be sure to include those topics on the meeting agenda.

Many of you know our receptionist, Dawn Rager. She is the first smiling face you see in our office and who answers the phone. Dawn will be sending you the meeting reminder email. So, before a meeting, keep an eye out for an email from dawnr@pwallc.net.

Webinar Recordings Are Now Available

We have had many requests for recordings of the webinars held in May and June.

If you missed either webinar, you may watch them by clicking on the video links below.

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