



Fraud Alert! Beware Of Suspicious Phone Calls, Text Messages, And Letters

Our office has received an uptick in clients who have fallen victim to fraudsters posing as a company the victim knows and trusts. They call the client to alert them of an issue, or a fraudulent activity, on their account. The fraudster appears genuinely concerned and eager to help resolve the issue. They pose as customer service or IT technicians of the company. They convince the victim to access their account(s) online by offering a “screen share” to “help you access the site” and quickly settle the issue.

Once the victim logs into their account with the fraudster connected to the computer, the fraudster is immediately given access to be able to scam the unsuspecting victim. Recently, we were made aware of a fraudster scamming a senior investor out of \$15,000 from their account. The senior investor properly logged into the account using the appropriate credentials, but since the fraudster was given access to the investor’s computer, they were able to gain control of the account and process a fraudulent wire without the investor knowing it occurred.

How we can work together to protect your information and assets. Safe practices for communicating with our firm.

- Keep us informed regarding changes to your personal information.
- Expect us to call you to confirm email requests to move money, trade, or change account information to ensure the request is valid by verbally verifying the data with you.
- We are here to help. If you receive a suspicious call, email or text and are unsure with how to proceed, call our office and we are happy to help research the legitimacy of the information.

[Click here for some best practices to help keep your assets and information safe](#)

Team Highlights

Congratulations to our Client Service Manager, Danielle, and her now-husband, Brian!

Team CIA at our beautiful Client Service Manager, Danielle's, wedding last month in St. Petersburg, Florida. We love celebrating you, Danielle. Congratulations again to Mr. and Mrs. Goff!



What The Happiest Retirees Know at Woodstock City Church

Woodstock City Church hosted our Chief Investment Strategist, [Wes Moss](#) a few weeks ago! Wes enjoyed sharing his research on happy retirees from 'What The Happiest Retirees Know' with such a great group.



Radio Show Expands to Denver and Nashville Markets

Best-selling author and radio host Wes Moss announced a new radio show for the Denver and Nashville markets. The new show, called Retire Sooner, airs on Sundays in Denver on KHOW from 11AM-Noon and Nashville on WLAC from Noon-1PM.

[Read more](#)

Client Spotlight



Caption from AJC article: Rett Godfrey, 8, (center) and his brother Foster, 6, are likely alive because the quick thinking of Joey Boassy and Mary Ellen Merriam

Our client, Mary Ellen, had no idea that her heroic actions would save two young boys on a typical afternoon in her suburban cul-de-sac! Mary Ellen, among others in her neighborhood at the time, assisted in saving the lives of two young brothers who were viciously attacked by frenzied Rottweilers twice their size. It was after she heard their screams that Mary Ellen ran towards the young boys prepared to save them.

[Read more](#) about Mary Ellen's brave actions and how the young boys are doing today.

WARNING: Some readers may find this story and photos associated with it to be graphic.

Please note Mary Ellen and the family in this story have given us permission to share their story and photo.

Retire Sooner Podcast



#79 – The Realities of Inherited Wealth and The Importance of Legacy with David York

Is inherited wealth a powerful tool or a destructive one? Though inherited wealth sounds effortless, there is more to successfully transferring this wealth amongst generations. In this episode, Wes sits down with Estate Planning Attorney, CPA, and Author, David York, to discuss the particulars of inherited wealth and wealth transfer.

David also shares the logistics of giving a TED talk and details from his book, "Entrusted." Additionally, David reveals the common habits of families who have successfully transferred wealth, walks through the background of a well-known wealthy family, explains how people learn to value things based on cost, and exposes five truths and the importance of legacy. David and Wes wrap up the

conversations discussing what steps families can take to remain successful in wealth transfers for the foreseeable future.

[Listen To The Full Podcast Episode Here](#)

More News

Is Inherited Wealth Powerful Or Destructive? Insights From Estate Planning Expert, David York



David York churns out nuggets of wisdom so effortlessly that it's easy to see why the TED Talk folks invited him onto their hallowed stage to define a new paradigm for thinking about inheritance.

An attorney, Certified Public Accountant, and managing partner with the Salt Lake City law firm of York Howell & Guymon, David is an expert in the areas of estate planning, tax, business planning, and nonprofit entities. He is the co-author of two books: "Entrusted: Building a Legacy That Lasts" and "Riveted: 44 Values that Change the World," which was the #1 Business Ethics book on Amazon. In 2017, YHG was recognized as an Inc. 5000 Company.

I recently sat down to ask him an unanswerable question that I desperately wanted answered: Is inherited wealth powerful or destructive?

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Inflation is dominating financial headlines. I don't like it any more than you, but we need to bravely face reality to help guide and shape our financial decisions.

A key inflationary data point revealed itself when the consumer price index (CPI) released its most recent numbers. As a reminder, the CPI is a measure of the average change over time in the prices paid by urban consumers for a market basket of a fixed set of consumer goods and services. In short, it's a good inflationary measuring stick here in the U.S.

According to the recent report, the CPI climbed 7.5% in January of 2022, compared to January a year ago. You'd have to go all the way back to February of 1982 to see an increase that big. That's 40 years!

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