

Zipporah Haynes

From: Marketing Email Preview Send <noreply@hubspot.com>
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Subject: Preview - August Newsletter: 5 Financial Things To Pass Down To Adult Children

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Top 5 Critical Things About Stocks And Finances To Pass Along To Adult Children

Everett Wilkerson



I love when clients, investors, and listeners of the *Money Matters* radio show and the *Retire Sooner* podcast reach out with questions for Wes and our team because I often get to jump into the mix and help. Some questions are straightforward, and others turn me into a research librarian, but many are thoughtful and useful reminders of what it takes to plan a happy retirement.

A few weeks ago, “Darrell from Dacula” wanted to know five critical things related to stocks and finances that he should pass along to his adult children. Such a thoughtful question. If Darrell didn’t get a Father’s Day card, there’s no justice in this world.

I initially answered his question quickly, as I’ve brainstormed for the future of my two boys and had some ideas already chambered. I was about to click send on the email when it dawned on me that I’m surrounded by a team of both mentors and protégés. These folks are the nuts and bolts of the operation. They get up every morning with the goal of helping Americans retire sooner and happier.

So I got up from my desk and walked down the hallowed halls of Capital Investment Advisors Atlanta headquarters. I came across our investment advisors, operations team members, and analysts.

After a shock and awe campaign of spontaneous, rapid-fire questions lobbed at anyone who crossed my path, I walked away with a haphazard stack of chicken-scratched post-it notes full of plucky, clever, and responsible tips. In hindsight, a full-sized notebook would’ve been a good investment.

And I didn’t stop there. We’ve got offices in Phoenix, Denver, and Tampa and all of them were fair game. I even reached out to a few well-respected competitors, to get a broad set of feedback from practitioners in the industry.

We received a lot of good answers and feedback, but here are our top five critical financial tips to pass along to your adult children.

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We've customized some step-by-step instructions on how to white label our domain, and add your CSA/CSM and your advisor to your 'safe sender' list.

[Let's curate my inbox](#)

Team Highlights

Inside The Office Of Investment Advisor, Dan Abramowitz

It's always interesting to see what other professionals have on their desks or the shelves in their offices!

Regional Business Development Manager and Investment Advisor, Dan Abramowitz shared his office set up with us recently. He uses this bookshelf to display a few things that he's thankful for including stress reliever superheroes from his sons, Carter and Jack, who gifted them to "help daddy get through the work day." He also keeps a few drawings from his kids, books that he loves and that have helped him in his career, wine from a client, and of course a Jacksonville Jaguars helmet. It's fun to switch these things out from time to time but these are the staples that remind Dan why he loves what he does.



Client Spotlight

The Weaver Family



Our clients, The Weaver family, recently took a vacation out west with their son and his family. They visited Grand Teton National Park in Wyoming, Yellowstone National Park and Golden Spike State Park in Utah - all beautiful places!

Please note, the Weavers gave us permission to use these photos.

The Ramey Family





This summer our clients, The Ramey's, are taking on the adventure of a lifetime visiting different countries throughout Europe. First stop, The Vatican, and an Italian Cafe. Second, Portofino, Italy.

Please note, the Ramey's have given us permission to share these photos.

What trips have you taken this summer? Reply to this e-mail and share with us!

Retire Sooner Podcast



#114 – What It Means To Live Life In Your Truth And With Integrity with Martha Beck

There's a difference between living the life you think you should live and living a life you want to live. When we follow numerous social norms we can easily lose our true selves in the process of conforming to what we think we are supposed to be. But in adapting to these norms, could we be missing out on a path to living our happiest lives and becoming one of the happiest retirees on the block? New York Times bestselling author, life coach, and speaker, Dr. Martha Beck, drops by this episode to share how to live a life full of integrity and truth.

Dr. Beck explains how we are born with a genetic destiny of what makes us happy in life and how we get divided internally early on. She also shares her story and experiences of living outside of her integrity, reveals her journey of becoming a life coach, and discusses longing versus yearning. Additionally, Dr. Beck unveils the lasting cure to happiness and lists the signs if you are lying to yourself and are living out of alignment.

[Listen to the full podcast episode here](#)

More News

Wes Moss Featured In GOBankingRates: How To Retire Happy

The clock is ticking towards your final day on the job. On the other side sits the promise of a proverbial pot of gold at the end of the rainbow.

Or so you have always been told. And you've always believed retirement would be just that.

If that's all true, why are you so anxious?

"Change is inevitably hard for everyone, and the shift from working to not working is huge!" says Wes Moss, Managing Partner and Chief Investment Strategist at Capital Investment Advisors in Atlanta. "For many people, they've been working since they were in their teens, and they know how to manage a steady incoming stream of income. We're talking about decades of consistent habits and lifestyle. From a human and psychological level, the transition will nearly always create anxiety. Will I run out of money once there are no more paychecks? What will my purpose be once my career and steady work income stop? So, it's completely understandable that the transition will create worry."

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