

Client Spotlight: A Happy Retiree Couple's Journey Along The Appalachian Trail



My job is to help folks find a path to happiness in retirement. Time, experience, and curiosity have accumulated into knowledge that I try to impart to my firm's financial clients, radio and podcast listeners, and readers. One of my rewards is hearing the stories told by the people who take this advice to the next level.

Pat and Paula Roberts live in a small town in Florida. One might think their idea of adventure would include the sun, the sand, and an ocean view. Not for these two. This year they decided to hike the Appalachian Trail, a two-thousand-mile public footpath along the Appalachian Mountains that spans from Georgia to Maine.

"What we lack in experience, we make up for in enthusiasm and tenacity," they said. And they weren't kidding.

[Read More about Their Journey](#)

Team Highlights

Capital's Favorite Movies to Watch this Fall



It was a long summer, but now the kids are back in school, the leaves are changing, and the Georgia Bulldogs are rolling. We have swapped the summer reading books out to create a fall movie list of some of our team's favorites. So get the popcorn poppin' because we've got some great ones.

[See Our Favorite Movies](#)

Happy Halloween from Team CIA



Our CIA team members, and their families, had plenty of fun trick-or-treating and dressing up during Halloween. Take a look at Client Service Manager, Chelsey Braswell's daughter's costume.

CIA's Annual Capital Cup



Our annual Capital Cup Tournament this year was a great success! Congratulations to Investment Associate, Brett Noggle, for earning the 2022 Capital Cup Champion title. It was a cold morning but turned out to be a gorgeous day with lots of camaraderie, shedding of layers, and an overall fantastic time. We were happy to have members from all of our other offices attend for a great day on the course.

Retire Sooner Podcast



#129 - The Importance of Community with Jan Cullinane

A sense of belonging, support, and accountability; these benefits come with joining a community. In this episode of Retire Sooner, Wes sits down with Jan Cullinane, award-winning and best-selling author, speaker, and consultant to discuss just how important communities are.

Jan described what questions you can ask yourself regarding where you are in life. She also shares the five P's for starting a business in retirement or otherwise, uncovers why strong social support is essential, and how the ability to renegotiate roles can be helpful in relationships. She addresses the importance of having a purpose in life and why women need to prepare to be in charge of their own financial decisions. To conclude, Wes and Jan talk through determining where to live in retirement, niche and non-traditional retirement lifestyles, and the psychology of money.

[Listen to the Full Podcast Episode](#)

More News

Giving To Others And Finding Your Marginal Propensity For Happiness - A Recap Of My Interview With Mitch Albom

Mitch Albom's books have sold more than forty million copies worldwide. But, if you ask me, that number is too low.

He's the successful author of many works, but the one that first transcended the American zeitgeist was *Tuesdays with Morrie: An Old Man, a Young Man, and Life's Greatest Lesson*. It's the story of Morrie Schwartz, his former college professor, and mentor. Nearly twenty years after losing touch, Mitch saw MORRIE on an episode of *Nightline* with Ted Koepfel discussing his battle with ALS, also known as Lou Gehrig's disease. After seeing the show the two rekindled their relationship. One phone call became fourteen life-changing in-person meetings during which Morrie spent his final days sharing lessons with Mitch. "The last class of my old professor's life had only one student. I was the student."

[Read the Recap](#)