Happy New Year – 2019

On behalf of all of us on the Darsch – DiNapoli team, we would like to extend our best wishes to you and your families for a happy, healthy and prosperous New Year. 2018 should be the year you are all looking for – shoot for the stars!

Our very best from our family to yours – Jake Darsch, Jessica DiNapoli, Zachary Wojtowicz, Kayla Lopes, Thomas Kizirian, and Sue Ann Votta.

What We've Been Up To?

Puppy/Dogs need foster homes after the holidays.

Throughout the year, the Darsch – DiNapoli Team, takes great pride in helping to find forever homes for animals that were either abandoned or couldn't be cared for by their previous owners. Especially after the holiday season, as many "pups" are given as gifts, the families soon realize they may not be up for the task of caring for a pet. It is always a hard decision, but that is why there are volunteers that shelter pets during home transition. If you would like to foster a pet and help find them their forever home, please visit the Non-Profit Organization called Stars Rescue and visit their website at www.starsrescue.org and to learn about upcoming local events and view pups available for adoption in RI, visit www.starsri.rescueme.org.

"Won't you consider being a foster parent"

To Do List for 2019….

- **Box up your 2018 financial statements in a secure location for a seven-year retention**
- **Review your financial accounts – make sure you are in the accounts that fit your "current needs"**
- **Call our office to set up a review of your financial accounts**
- **Let us create your PFV (Personal Financial View) account – so you can keep "all" of your financial accounts in proper order with just one click**

Jake and Jessica's Corner

Another year has gone by, and you may be asking yourself, "Am I where I want to be, financially"? Most people will answer no, and that is ok – that's why our team are here.

Together, we want to help you stay on track, which may include adjusting old plans or creating new ones to ensure you stay on the right path. We take pride in being your "in-person resource" and helping you make the most educated financial decisions, so reach out and we will walk you through any changes.

Upcoming Events

Workshops at the Universities Kicking off 2019 with Financial Literacy – All are welcome!

The Darsch-DiNapoli provides monthly workshops at all state universities/colleges on various financial literacy topics. Our goal in conducting these workshops is to provide you with the knowledge you need to make informed financial decisions. If you are not a university employee, you can still register, as all are welcome to join and learn.

For more information and to register for any of the above workshops, please visit our website link: http://www.BarnumJJ.com/events

Team Update

Barnum Financial Group

2018 has certainly been an interesting year in the market place. Lots of ups and downs but history will tell you "it will recover". However, this is the best time to reach out to us and schedule your "Wellness Appointment" with your team advisor. You wouldn't let your yearly health check-up pass by, please don't let your financial check-up.

Call Sue Ann to schedule your appointment for the 1st quarter of 2019 and we will make sure you are in good financial shape! 401.243.8872 or sueann.votta@barnumfg.com

Focus On

Financial Wellness Month

Go to www.BarnumJJ.com and request more information to get yourself in shape of contact Sue Ann at 401.243.8872 or sueann.votta@barnumfg.com

Meet the Team

Peter (Jake) Darsch, CLTC, RICP®
Financial Services Executive | Special Care Planner | Investment Advisor Representative

Jessica D. DiNapoli
Financial Services Representative | Registered Representative

Zachary Wojtowicz
Financial Advisor | Financial Services Representative | Investment Advisor Representative

Kayla Lopes
Financial Advisor | Financial Services Representative | Investment Advisor Representative

Thomas Kizirian Jr.
Financial Services Representative | Registered Representative

Team Spotlight

Faces of Rhode Island 2019

Once again, our team was spotlighted in the December Special Edition of Faces of Rhode Island Monthly, just released in newstands end of this month. Please pick up a copy when you are out and about.
Please visit www.rimonthly.com
for viewing of the December RI Monthly Issue

BARNUM FINANCIAL GROUP

We hope you've enjoyed this month's newsletter! If you know anyone who could benefit from our services, please don't keep us a secret. We are now accepting new clients! Visit the team's new website for further information at www.BarnumJJ.com

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