



Spring 2023

## On Deck with The Darsch – DiNapoli Team

**Welcome Spring!** What a winter we had or didn't! Not much snow, mild temps and short days; but the birds are cherping and flowers are peaking through. Signs of warmer and longer days ahead.

Please let us know if you should need anything from our team. Contact Sue Ann, Practice Manager, at 401.243.8872/email her at [sueann.votta@barnumfg.com](mailto:sueann.votta@barnumfg.com).

### Our partnership goal to you.

We take a personalized approach, working to understand what is most important to you, both personally and professionally. We then use our collective expertise to develop thoughtful financial solutions to help you achieve the future you want.

Our focuses include wealth accumulation, asset protection, retirement planning, and income generation strategies utilizing products and programs from a wide-range of industry-leading financial services and investment management firms. Underscoring all we do is a deep commitment to providing you with the knowledge you need to make informed financial decisions with confidence and with quality service throughout our relationship.

#### Other Areas of Focus:

Retirement Planning | Investments | Tax Management | Employee and Executive Benefits | Estate Conservation | Risk Management | Education Funding

Insurance Planning | Group Life Benefits | Income Replacement | Long Term Care Benefits | Medicare

### Life Insurance Needs – Call Jessica!

#### Do you often wonder the following:

- Do I have enough life insurance?
- What kind of insurance should I get?
- What is the best company to buy insurance from?

Planning today can help with recovery from the unexpected tomorrows and give you and your family peace of mind knowing your loved one will continue to have the same quality of life they deserve.

Jessica DiNapoli has 14+ years' experience helping families in the life insurance arena. If you find yourself looking for more information, please Jessica directly to book an appointment today!

401.243.8880



## Financial Literacy Virtual Workshops!

The Darsch-DiNapoli team provides virtual monthly workshops on various financial literacy topics. Our goal in conducting these workshops is to provide you with knowledge you need to make informed financial decisions. All are welcome to join and learn.

For more information and to register for any of the workshops, please watch your email for personal invites via zoom!

## Spread the wealth!

We hope you've enjoyed our newsletter! If you know anyone who could benefit from our services, please don't keep us a secret. We are currently accepting new clients! Visit the team's new website for further information at [www.BarnumJJ.com](http://www.BarnumJJ.com)

## Focus On Financial wellness



Photo credits courtesy of FMG suites and Jake Darsch, 2023

## Meet the Partners

**Peter (Jake) Darsch, CLTC, RICP®**

Financial Planner | Financial Services Executive | Special Care Planner | Financial Advisor

**Jessica D. DiNapoli**

Financial Services Representative | Registered Representative

**Dylan Unger**

Financial Advisor | Investment Advisor Representative

**Sue Ann Votta**

Practice Manager | Marketing Manager

**Nicole Chartier**

Administrative Assistant

## New location!

Jake has moved! For many of you that know Jake – where did he say he always wanted to live? Durango, CO! Earlier in February, Jake closed on a second home in Durango, CO and is spending one week there, per month to get settle into the town and meet new friends/clients. This is an exciting time for Jake but fear not he will still be available for you; his RI clients and his team of advisors and support staff will continue to service you.

Technology has proven to us that you really can work from anywhere in the world.



Durango, CO – downtown at sunrise