



## On Deck with The Darsch – DiNapoli Team

### Welcome Summer!

Join us in welcoming New England's favorite time of year – Summer! Time to take a break, enjoy family vacations and soak up the Vitamin D to rejuvenate you.

Please let us know if you should need anything from our team. Contact Sue Ann, Business Operations 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 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

### Congratulations on One-Year with Us!

Nicole Chartier – Administrative Assistant for Team Darsch - DiNapoli celebrates one year work anniversary with Barnum Financial Group.

Nicole has been a wonderful addition to our team and getting to know each of the clients by reaching out setting up annual reviews or simply just “checking in”. Next time you hear from Nicole, please extend your best wishes for another successful year ahead.



### Barnum Internship Program

Michelle Hite, VP of HR

203.513.6390

[mhite@barnumfg.com](mailto:mhite@barnumfg.com)

## Summer Hiatus

During the summer the team takes a break from webinars - but stay tuned for a new line-up starting in September 2023!

## Social Media!

Did you know that our team has many avenues on social media to view financial content?  
Check out the following links:

<https://www.facebook.com/darschdinapoli/>  
<https://www.linkedin.com/company/93164495/admin/>

## Summer Spirits

### Mango/Berry Mocktail

- Muddled Mango and Raspberries
- Agave
- Lime
- Ginger Beer

**\*\*Mix together and shake up with ice\*\***  
Sit back, relax, and enjoy a mocktail with some friends.



Photo credit - pexels.com

### 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

## Summer Fun in Rhode Island

Everyone loves coming to Rhode Island for the summer. What's not to like; you have beaches, fabulous restaurants on the waterfronts, summer concerts, lots of festivals and so much more. Now is the time to "reset" with your family and enjoy all that Rhode Island has to offer in the summertime.

Check out <https://bestthingsri.com/summer-activities/#gsc.tab=0>

The 10 Best Summer Activities in Rhode Island.

Leaving a financial legacy is great but leaving a legacy of memories is what it is all about.

