

Seasons Greetings

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Your Team Of Financial Professionals



SARAH, JASON, PRICE, CHARLIE, JACKIE, CHIP

We Offer Personalized Strategies in:

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Investment Management
Estate Planning
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the **POTTER**
financial group
Navigating Your Financial Journey

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Please share this newsletter with friends and colleagues who may be interested in this information

*Joy, Light and Thankfulness,
It's The Holiday Season*

We say it each time a year comes to an end, “Where did the year go?” It was a busy year at The Potter Financial Group and the time did seem to rush by. Now as we enter the holiday season it is a time to reflect on what we are grateful for and plan for a holiday season filled with joy, family and thankfulness.

All of us at Potter Financial are grateful for our families, our friends, and the team of amazing people here. It is terrific to be able to come to work where all of us share the idea that clients come first. It is also wonderful to know that we support each other in our commitment to excellence.

We are also grateful for all of you, our clients, who honor us with your trust. Please know that we will always strive to do our best for you, your families and your businesses. Our roots in this community go deep and we truly see ourselves as your partners in helping you create a strong financial future.

It's also the season of fun and family and we all have plans to celebrate this holiday season with family, travel and fun.

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It's The Holiday Season

Chip is planning a family Christmas Lights road trip to visit some small North Carolina mountain towns like McAdenville (aka Christmas Town USA) and Forest City. They will be staying at the historic Lake Lure Inn near Asheville where part of the Dirty Dancing movie was filmed.

Price is traveling to Florida to join his mom and uncle for Thanksgiving and then after Christmas at home he is traveling to St. Lucia for some sun and fun.

Jason, Jackie, Sarah and Charlie are spending the holidays with their families and friends.

We wish all the peace and joy of the season to all of you.

*Chip Roe, Price French, Charlie Potter,
Jackie McDowell, Jason Harmon, Sarah Stott*



Potter Financial Group Welcomes It's Newest and Youngest Member!

Jason Harmon and his wife Amy and daughter Claire welcomed new baby Carson Harmon on October 8. Carson joined the team at 7 pounds 13 ounces. Congratulations to all the Harmon family.

The Potter Financial Group's Holiday Brunch Provides a Break From the Busy Holiday Schedule



Our open house holiday brunch on December 14th is a great time for both our clients and all of us at The Potter Financial Group. A relaxed and lovely way to take a breather from the holiday stress. From our family to yours, it's our way of saying thank you.

**Potter Financial Group
Open House Brunch and Holiday Break
Saturday, December 14, 2019
Washington Duke
11:00 AM through 1:00 PM**



In honor of this season of joy and giving we will be making a donation to **Urban Ministries of Durham** whose work helps provide food and shelter to over 6,000 men, women and children each year. This is especially important now, as they have a dollar for dollar challenge until January 21, 2020.

Financial Resolutions You Need to Make: And How to Keep Them

We all start the year with good intentions but we also know that we sometimes let those good intentions fall by the wayside. Did you know that gym memberships increase by almost 40% between December and January, yet gym managers estimate that just over a quarter of those people stick with their resolutions? *

It's the same with all our resolutions, including financial ones, but there are ways to maintain them. So here are some financial resolutions we can help you keep.



•Schedule your review dates with us to make sure your financial strategy is on-target to meet your goals. Do this in January for the rest of the year, that way we will make sure those important review meetings take place. We can help you check off these financial resolutions:

- Review all credit lines, mortgages, credit cards, etc.
- Make sure we have all your current, pertinent information
- Make sure all beneficiaries on insurance policies and retirement accounts are up-to-date
- Review all life insurance policies to make sure they are still relevant to your needs and situation
- Make sure your financial plan is still on target to meet your goals and make any needed adjustments

Organize and file all pertinent financial information – make copies and keep them in a safe place offsite. The Potter Financial Group has a “Virtual Vault” where you can store these important files. Please ask us about it. We can help you get this resolution checked off the list and help you keep it current.

Make sure to provide a trusted family member with all your pertinent financial information including who we are and how to contact us.

The best way to keep your financial resolutions is to use us as your partner. All of us at the Potter Financial Group are here to help you keep your financial resolutions. Please call us at any time to discuss this or anything else you may need help with.

* International Health, Racquet & Sportsclub Association (IHRSA),

**BOOK OF THE
MONTH**

***The Pioneer Woman Cooks:
The New Frontier***

Ree Drummond



Tis the season for comfort food and beloved chef, Ree Drummond better known as the Pioneer Woman has a new book filled with great home-cooking recipes just right for this time of the year. Home-cooks everywhere will find great ideas for breakfast, lunch, dinner and of course snacks and dessert. It makes a great gift for someone on your gift list or a treat for yourself. The cooks in our group highly recommend.

News For 2020

As the New Year approaches, Potter Financial Group is very excited to tell you about some of the things that we are planning for 2020.

First you need to know that we think of our team and our clients as a true community. That's why over the course of the next year we will be planning social events that will bring that community together to do some great, fun stuff.

We're also planning to hold a number of educational events. We believe that the better informed you are, the better our partnership with every client becomes. It's important to us to not just be financial advisors, but "financial educators" as well.

We're also very excited to announce that our new website will be going live in 2020. We are starting the process of building it now. The new site will provide you with more information and make very clear how our firm and our team works to help you reach your financial goals.

Finally, your guests are always welcome at a Potter Financial Group event. Just let us know in advance and we'll send them an invitation.

November is National Caregivers Month. Our warmest wishes to all the caregivers who give so much back to their families and community.



This newsletter is produced to keep you informed about the team at PFG and provide information on financial issues you need to know about, as well as keeping you updated on upcoming events and seminars. If there is a financial issue you want to know more about, or an idea that should be mentioned here, please let us know.



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