



VALUES FIRST PLANNING

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Please share this newsletter with friends and family. Thank you for allowing me to partner with you in pursuing your financial goals. You can learn more about our approach to investing at my [website](#).

John

More than Money

April 2023

Finding Growth in a Tough Market

I spend a good part of every day looking at, reading about, listening to and searching for ways to help each of our clients make progress on their biggest goals. Whether that is by minimizing the risks from market declines, finding sustainable income yields or exploring clever (and totally supportable) strategies to reduce your tax bill. This is my piece of helping you and your family thrive.

That being said, we don't manage your money in a bubble. Experience teaches me that money has a limited ability to provide us with a long, meaningful and joyful life. The last few years of global turmoil have obviously created some stress. We hope to return to times of ease and even a bit of excess where we don't have to stress or adjust. While I am confident that good times will return, don't miss the opportunity to challenge these ideas that a happy, healthy and joyful life can't be experienced while we wait for better days.

When we adopted "Values First Planning" as the name that best describes what we do, we also made a commitment to help you identify and clarify your unique core



[LPL Weekly Market Commentary](#)

(Click for article)

Annual Shredding Party and LUNCH

Friday, April 21

11:30—1:30

Celebrate the end of tax season with us. Bring us your documents for shredding and stay for lunch. RSVP to (405) 348-3236

Shredding service provided by The Meadows Center for Opportunity



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values. The fundamental idea is that your resources need to support and be in clear alignment with the things you value most. Our job is to help you manage and use those resources as efficiently as possible to achieve a full and successful life for you and your family.

What are the big drivers to success? Most of us will be on this planet for 65-95 years. What makes that time worthwhile? What are you building? What are you anchored to? What is weighing you down? It would be great if we had a roadmap to a joyful life! Well, Harvard University has actually been studying this very question since 1938. [The Harvard Study of Adult Development](#) is one of the longest and most diverse studies of adult life in existence – and it is still ongoing.

Please take the time to click on the above link and give the article a read. There is also a great video that tells the story and offers some valuable insights into the key questions of happiness.

Maybe you feel like life is on hold until the global, financial and even governmental chaos subsides. But let me encourage you to continue to intentionally invest in the areas of life that can provide meaningful, sustainable growth – relationships.

I find this study and its conclusions profound because its core findings are in total alignment with the lessons of my faith – that people are more important than things. And the best things I can do with my resources is to invest in people and relationships.

Your resources are very important. The fact that you entrusted us to advise you is a responsibility we take very seriously. But the greatest growth you can experience as human being will be found in the relationships you cultivate. Putting those *Values First* and sharing your goals with us will make us better at helping you achieve a life worth celebrating.



Opposites Attract

Do you have the same argument with your partner over and over? Believe it or not, that's completely normal! In this episode, Jeff and John discuss how opposites attract, and what that means for your relationship.

Click [here](#) to listen.

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