



August Events



Welcome new  
team members



Treece Financial  
Group Referrals of  
the Month



Updates on the  
markets and risk  
concerns

## Dear clients and friends,

Welcome to our brief July newsletter. We hope you have been having a wonderful summer so far. We have a lot of updates, events, and referrals to share.

## August Events



We are planning several workshops on topics like Social Security and IRA planning as well as two seminars on aging and senior issues including long term care planning and Medicaid planning. Please see the dates and locations below and RSVP by email at [info@davidtreece.com](mailto:info@davidtreece.com), or call our office at 305-751-8855, or visit our website and register online:

[www.treecefinancialgroup.com/events](http://www.treecefinancialgroup.com/events).

**August 14<sup>th</sup>** – Smart Strategies to Help You Take Control of Future Long-Term Care Needs, *Hallandale Beach*

**August 17<sup>th</sup>** – Investing for Growth and Safety, *Miami Shores*

**August 23<sup>rd</sup>** – Living a Fearless & Fabulous Retirement: Financial Planning Tips for Older LGBTQ Individuals, *Miami*

**August 15<sup>th</sup>** – Smart Strategies to Help You Take Control of Future Long-Term Care Needs, *Fort Lauderdale Pride Center*

**August 22<sup>nd</sup>** – Savvy Social Security Planning: What Baby Boomers Need To Know To Maximize Retirement Income, *Miami Shores*

**August 24<sup>th</sup>** – Savvy IRA Planning, *Miami Shores*

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## Welcome Djavan Clarke



Djavan "Dj" Clarke is currently pursuing a bachelor's in Finance with a minor in Marketing at the University of Central Florida. He is in his senior year and is set to graduate in the spring semester of 2018. As a Customer Service Representative/Intern, his responsibilities include database management, and marketing campaign assistance. Dj has taken an array of business courses covering subjects such as accounting, corporate finance, financial markets, and foreign exchange markets. Dj's long term goal is to pursue a career in wealth management.

Dj was born and raised in Miami, Florida. He is extremely active and enjoys physical activity and personal fitness. Some of his hobbies include weightlifting, doing gymnastics, and playing soccer.

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## Treece Financial Group Referral: Marcela Cid



As most of you now know, Marcela has moved on from Treece Financial Group where she was David's personal assistant for many years to pursue her passion in Personal Training. She is an active trainer teaching Functional Fitness sessions: Train Like an athlete. Improve your mobility, balance, flexibility, strength and speed. The sessions include HIIT (high intensity interval training), Circuit, resistance and suspension training, agility drills, and more. Burn fat fast! Get better, fitter, stronger. Discover your true potential.

If your goal is to get fitter and stronger while performing better in your daily activities and improve your overall health, these sessions are for you. No matter your fitness level, sessions are

tailor made and adjusted as you make progress.  
Get control of your life NOW. One life, one body.  
For more information contact Marcela @  
[marcidfitness@gmail.com](mailto:marcidfitness@gmail.com)

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## Treece Financial Group Referral: Beth Barteletti



Beth Barteletti is a client of Treece Financial Group and the Director of College Counseling at International College Counselors. Beth has spent her entire career as an educator. Her experience includes working in the admissions office at Reed College in Oregon, serving as a college advisor at American Heritage School in Plantation, as well as working as an independent college advisor. She has helped hundreds of high school students and has read thousands of college applications.

She will be offering the following seminars at the Brockway Library, 10021 NE 2nd avenue Miami Shores, FL 33138:

**September 9<sup>th</sup>** – College Admissions:  
What Colleges Look For And How To Get  
In, 10:30 am – *Miami Shores* – *RSVP*  
[goo.gl/pMp8BQ](https://goo.gl/pMp8BQ)

**September 16<sup>th</sup>** – Applying to Ivy  
League And Highly Selective Colleges,  
10: 30 am – *Miami Shores* – *RSVP*  
[goo.gl/eqNGVa](https://goo.gl/eqNGVa)

RSVP to a Free Seminar!  
954 414-9986 ext. 0

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## Updates on the Markets and Risk Concerns



Consumer sentiment remains high, but has leveled out. According to the latest index of [consumer sentiment](#) “the data provide no indication of an imminent downturn nor do the data provide any indication of a resurgent boom in spending.” Many of our clients have asked about risk levels including political risk with the Trump administration. The markets have largely responded mostly to economic fundamentals and the prospects of reduced regulation, tax cuts and possible infrastructure spending. Here is an



[interesting article](#) that addresses the current scandals in the Trump administration over Russia, and posits that the market may still have reasons to respond positively regardless of the fate of the Trump Administration. Our advice is to always make sure you are invested according to your goals, time frames, and risk tolerance. If you are concerned about missing out on potential gains, but worried about risk, we have several alternatives that might suit you including using money managers who will go to 100% cash or government bonds in any crisis. Please contact our office for more information, and we can review these options with you.



As always, please don't hesitate to contact us if we can be of any help.

All the best,

Links embedded in the article:

<http://bit.ly/2gXEo9o>

<http://on.mktw.net/2uhApdk>

<goo.gl/pMp8BQ>

<goo.gl/egNGVa>

