STRATEFI
WEALTH MANAGEMENT

As we continue to inch closer to the tax deadline of April 18th*, our team has been trying to stay a step ahead by sharing this tax prep checklist and highlighting some common scams to watch out for during this time of the year.

We remain dedicated to assisting our clients in all aspects of wealth management. To that end, we're sharing resources on financial self-care, reducing debt and budgeting, retirement planning, and vacation planning this month.

**Note: California is extending the tax filing deadline for Californians impacted by December and January winter storms to October 16, 2023. Learn more here.*

RESOURCES

Reducing Debt Takes Commitment

Debt may be easy to get into, but it is usually much harder to get out of. Reducing your debt takes time and patience. Consider this eight-point game plan.

Read Here

10 Rules for the Retirement Road

There are many things to be aware of when it comes to your retirement investment plan. These 10 strategies can help steer you in the right direction.

Read Here

Creating a Household Budget

Statistics tell us that the leading cause of household stress is money. Creating a household budget can help to eliminate some of this stress. Here's where to start.

Read Here

Helping Aging Relatives Get the Care They Need at Home

Most of us will need to help take care of an aging relative at some point. If you would like to allow your relative to remain comfortable in their own home, it is important to take the right steps as early as possible.

Read Here

Cyber Intelligence Today

An LPL issue with updates on ransomware, phishing, and awareness.

Read Here

ON THE WEBSITE

Read More Blog Posts

ACCOUNT VIEW 2.0

Don't have access yet? Please request your activation link here and be sure to include your name in the request.

Request Activation Now

LIFE COACHING

Life coaching is the process of helping someone find the path between where they are **now** and **where they want to be**. We've partnered with Coach360 to provide you with a way to connect with coaches covering various life topics, including but not limited to retirement, empty nesting, relationships, and more. For the coaches, the first introductory meeting is free. After that, if you want to set up additional sessions, you can work with the coach on pricing. You can mention to the coach that you accessed their information through Coach360.

Click here for the sign-up guide, a step-by-step document with screenshots to help follow along:

Sign-Up Guide

YOUR FRIENDS & FAMILY

We provide a value-added service for your friends, family members, and colleagues. **If they are important to you, they are important to us.**

We're happy to be a sounding board for their financial concerns, and utilize our over 50 years of combined experience to help.

Please feel free to send them our contact details or you can give us their info and we'll be happy to schedule an introductory meeting.

JUST FOR FUN

Asparagus Quiche

This asparagus quiche combines great ingredients that result in a tasty dish.

Click Here for the Recipe

As always, thank you for allowing us to be part of your financial journey

All the best,
Your StrateFi Wealth Management Team
Jason, Merrick, and Kim

Book An Appointment With:

JASON & MERRICK (Joint Meeting)

JASON | MERRICK | KIM

You can Also Text

Jason: 775-204-2219
Merrick: 949-997-1886
Kim: 949-997-1868

Note: Texting services are for business purposes only.

STRATEFI
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Finding the Way Together

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