



Welcome to the March 2021 Harvest Group Wealth Management Newsletter

Each month it is our goal to provide you with timely and informative information on topics that we feel are important to you and your family. However, if there is a topic you would like to learn more about, please let us know and we will do our best to include information about that topic in future newsletters.

In addition, if there is someone important to you that you think could benefit from receiving this newsletter, please ask for their permission, then provide us with their contact information and we will include them on our distribution list.

The Harvest Group is proud to announce that Managing Partner, Laurie Ingwersen, recently earned the Certified Exit Planning Advisor (CEPA) designation. This helps Laurie work with business owners to maximize the value of their business, take their personal and personal financial plans to the next level, and be prepared for what adventure comes next after transitioning their current company.

In Laurie's words, "What has me excited about becoming a CEPA is that now, I have even more tools, methods, and approaches to help business owners accelerate value and improve transition outcomes when that time comes. Beyond that, this experience confirmed that collaboration among advisors is crucial to achieve optimal outcomes. While that may sound obvious, we both know that not all advisors share that view."

Upcoming Events

For more details on upcoming events, please visit our events page on our website at <http://www.myharvestgroup.com/events>

March

Innovative Technologies, ARK Big Ideas 2021

Wednesday, March 24th 12:00-1:00PM

April

Tax Planning for The High Net Worth Family

Tuesday, April 27th 12:00-1:00PM

May

Cyber Security, How to Protect Yourself in Today's World

June

LGBTQ Households, Tailored Estate and Financial Planning Considerations

Watch the latest Harvest Talks Video as Laurie Ingwersen discusses Tax Savings Opportunities

[Click Here to Watch the Latest Harvest Talks Video](#)



Retiring in a Post-Pandemic World

Imagine your ideal post-pandemic retirement with this hopeful, animated video.

[Learn More](#)

Risk Tolerance: What's Your Style?

Learn about what risk tolerance really means in this helpful and insightful video.

[Learn More](#)



Succeeding at Business Succession

There are a number of reasons for business owners to consider a business succession plan sooner rather than later.

[Learn More](#)



contact@myharvestgroup.com

844-996-3300

The Harvest Group

<http://www.myharvestgroup.com/>



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