



More than Money

December 2021

John D Mitchell, CFP®
1300 East 9th Street,
Suite 10

Edmond, OK 73034
Office 405.348.3236

John.mitchell@valuesfirstplanning.com
www.valuesfirstplanning.com



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

[Weekly Market Commentary from LPL](#)

(Click to be taken to article)

Friend, follow or connect with us on social media! (Click icon for platform)



Finding Joy

As we race down the hill to Christmas and the end of 2021, we want to take a moment to thank you for letting us partner with you. The last couple of years have brought many challenges and a few planning opportunities. While the future is always hidden from us, we look forward to helping you pursue your families core values.

For the last two years, I have been operating in a mindset of caution. Most of our normal, longer-term plans have been put on hold and we, like others, have been living the wait-and-see-life. As you might imagine, my profession requires me to keep up on the news and always be looking out for the

next potential catastrophe. For the last two years, that's been almost every story.

My guess is that you are as weary from all of this as I am. One of the nice things about our calendar is that it has ends and beginnings. And while there is truly nothing magical about December 31 or the following January 1, we can choose to use these days as a reset. I am choosing to do just that

-Continued on page 2-

Finding Joy - continued

and invite you to join me.

In 2022 I am going to choose to pursue JOY. Obviously, that will not change the facts as they unfold through the year. But what it might change is how we navigate them. Many of you have noted that I am usually pretty even keeled. But due to all the heaviness we have experienced recently, my “keel” is sitting lower in the water than normal. I think it’s time to carry fewer of the things that I can’t control and start living a little lighter.

While many have attempted to explain the difference between happiness and joy, most of us understand that happiness is limited by your circumstance or your ability to control events around you. Joy has much more to do with being grateful for where you are in the moment and making a positive difference in the lives of those around you.

So, what does that practically look like for me? It means I will be investing more time with friends, offering more hospitality, exploring more activities with my last child still in the nest, and overall re-committing to putting my *Values First* again. What will I do less of? I will watch less news after work, engage less in placing blame, and spend less time trying to solve problems that are far outside of my control to influence.

My question for all of you is simple: What have you *stopped* doing over the last couple of years that fostered joy in your life? And as a follow-up question: What have you replaced that with? Maybe the next few weeks could be a great time to review your family’s values, evaluate whether or not you are living them out together, and decide to make the necessary corrections for the new year – regardless of circumstances.

If we can be of any assistance in helping you rediscover your joy – let us help.

Merry Christmas!



John D. Mitchell, CFP®

1300 E. 9th St., Suite 10

Edmond, OK 73034



VALUES FIRST
PLANNING

Office 405.348.3236

www.valuesfirstplanning.com

Investment advice offered through Values First Planning, a DBA of Advisor Resource Council, a registered investment advisor. Additional information, including management fees and expenses, is provided on our [Form ADV Part 2](#), available at the SEC’s Investment Advisor Public Disclosure website. As with any investment strategy, there is potential for profit as well as the possibility of loss. We do not guarantee any minimum level of investment performance or the success of any portfolio or investment strategy. All investments involve risk (the amount of which may vary significantly) and investment recommendations will not always be profitable. The underlying holdings of any presented portfolio are not federally or FDIC-insured and are not deposits or obligations of, or guaranteed by, any financial institution. **Past performance is not a guarantee of future results.**