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Dear Friends and Clients-

Please enjoy this newsletter from the Griffith Earl Savery Group.

### **Educational Topic**

As many of you know, we believe that Dimensional Fund Advisor's (DFA) is one of the premiere and world-class investment fund providers. As such, we use their funds within many client portfolios. David Booth who founded DFA over 40 years ago, recently authored a short piece outlining his "Five Timeless Lessons from his Decades in Finance." We want to share this with you – please see the attached – and some additional insights from our team below:

1. What is extremely interesting is that arguably four of the five lessons falls on you, the investor and client, to be successful. While we as your financial advisors help you in every one of these lessons, the "burden" is ultimately yours. And also, please do not think for one moment that we as your financial advisors do not share in that same "burden" when managing our own personal investments!
2. You will notice that no lesson revolves around being able to successfully "pick the right stocks" or "correctly time the market." The reason is that successful investors need to do neither. In fact, we have much research that suggests both actually detract from successful investing. People keep falling into the same old traps. They might chase the latest fads and keep picking stocks. They might try to time markets. These investors can hurt their chances of long-term success while adding to their anxiety. Investing doesn't have to be that way.
3. Check out this video regarding the uncertainty of the markets:  
[https://videos.dimensionalfund.com/share/v/1\\_2idj106p](https://videos.dimensionalfund.com/share/v/1_2idj106p)
4. In our view, our industry as a whole needs to change the conversation so that people can invest better – and live better. Far too often in the past, conversations involved only that of investments, stocks, bonds, asset allocation, etc. A far more valuable conversation would include topics such as found within these lessons – how to embrace uncertainty, how to tune out the noise, etc.
5. Check out this video regarding tuning out the noise:  
<https://www.youtube.com/watch?v=wAlmkOQ-ips&t=1s>
6. While these lessons apply well to all investors, they can be especially powerful to the younger generation. Please feel free to share this with anyone you may know. As the last line states, "Discipline applied over a lifetime can have a powerful impact."

## **Utica Baird News**

We are in the process of renovating our entire office and that should be complete sometime in June. Fortunately, the renovations for the Griffith Earl Savery space is complete and we have moved into our new offices! We are still working out some kinks, but the new office is beautiful we and can't wait for you to see it.

Baird is still not yet allowing in person meetings in our office. However, Jon and Matt are happy to meet with clients outside of our office. We may need to get creative in where we meet, but if you wish to meet in person, we can accommodate. We are also always available by phone and by WebEx as well. Thank you for your understanding and we hope our office opens soon.

## **Community Involvement**

This month, we would like to highlight The SUNY POLY Foundation's Day of Giving. The SUNY Poly Foundation uses funds raised for the event as a convenient way for alumni and friends to contribute to move the university forward while ensuring students can proceed with their education despite the economic challenges many of our students are facing today due to the COVID-19 pandemic.

## **Get to Know Our Team - Matt**

We are trying out a new section this month that will hopefully give you a glimpse into the personal lives of our team. First up is Matt...

As you may know, Matt graduated from Syracuse University and can rarely be found outside of work without wearing some kind of Syracuse apparel. Matt and his family like to go on adventures and recently visited Letchworth State Park (near SUNY Geneseo where Matt's wife Cherie graduated). They had a beautiful day of spring weather and took the family picture below. And with three boys, they escaped Letchworth without any (serious) injuries!



### Questions/Comments

If you have a question or comment that you would like us to answer or address in a future monthly newsletter that you think would benefit other clients, feel free to shoot us an email. Please use [GESGroup@rwbaird.com](mailto:GESGroup@rwbaird.com). We'd love to hear from you!

Thanks so much for your time in reading this end of April/Early May communication from our team.

We wish you all the best,

The Griffith Earl Savery Group

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