



VALUES FIRST PLANNING

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

John

More than Money

March 2024



Freedom From Choice

Growing up in the 70's and 80's was an interesting time. So many new choices everywhere we looked. When I was young, we had five TV channels to choose from. By the time I was in high school my friends in the city were beginning to get cable with dozens, then hundreds of available channels.

As I have become more seasoned, I realize that too many choices can be exhausting and even paralyzing. Whether we are trying to pick a show to watch on a streaming service, choosing cereal at the grocery store, or just picking where to get dinner, we waste a lot of time, energy and resources exercising our "right to choose."

If you need more proof of the problem, just look at your calendar. Most of us don't have much white space left on our schedule. It gets filled up quickly by things that seem important in the moment but keep us from being able to spend time with the people we love or do things that truly make life richer. But if you do the work to identify your family's core values, you can be free from the onslaught of endless choices and other people's priorities.

What we're really talking about is alignment.

Having our finances in alignment with our core values means we are on the same page as to how

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[LPL Weekly Market Commentary](#)

(Click for article)



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Freedom From Choice

and when we use money to accomplish our shared goals.


Aligning our resources (even the non-financial ones) with our goals keeps us from being easily distracted by what others choose to do with their resources – we feel content with what we are choosing to build together.

When we each use our resources in alignment with our goals, it builds trust in each other. We know we are working together and respect one another.

In short, alignment feels like freedom.

If you feel like you're burning the candle at both ends or running out of funds before the next deposit – take time together to review how your time and money may not be aligned with what you value most. Don't be afraid to streamline your life and focus on fewer great things.

If you need help discovering what matters more than money in your family, or how to right-size a busy life, let us help!



**Annual Client Appreciation Lunch
and Document Shredding**

Friday, April 12, 2024 ✧ 11:30—1:30 ✧ Conference Room

We'll provide lunch *AND* a final resting place for your private papers

RSVP to (405) 348-3236—choose early or late seating



There is no Easy Button

There's no shortage of self-help books, and yet people still find themselves stuck looking for "the answer." Jeff and John discuss the process required for true change. Surprise - it takes hard work and communication. Click [here](#) to listen.

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