



## Welcome to MWM Quarterly! Q1 2019

The more things change, the more they stay the same. That saying has been uttered countless times, by countless people, and it can be used to describe the updates here in Suite 230. What hasn't changed is our focus and goal of serving all of you.

We have added a team member, Alyssa, who has made an immediate positive impact on our ability to serve all of our clients, added a new logo and company name, and launched a very robust website: <http://www.meyerwealthmanagement.com>.

However, Meyers still outnumber non-Meyers, Rick still stops by Starbucks every day on his way to the office, and our commitment to serving you, our clients, has not wavered an inch. In fact, all of these changes are geared towards enhancing our services for you and your experiences with us.

Another new item; this newsletter. We will be sending out a quarterly note with helpful information about our office, the markets, and our general thoughts about the investing environment. We will include links to items we find interesting, many of which will lead back to our website, which we hope will be an immediate source of information and a resource for you.

### Greg's Glimpse:

On that note, the first quarter has seen stocks continue their bounce off of the December 24, 2018, recent market bottom. The S&P 500 is up nearly 14% year to date - a significant move up to start any year, especially nice following a tumultuous fourth quarter for stocks. Stocks, as measured by the S&P 500, have not fully surpassed their highs of September 2018, but are only a few percent below that level. Many headwinds remain in place pushing against broad stock market appreciation: trade negotiations, international economies slowing, and a slowing of earnings growth, just to name a few. We continue to believe that the prudent path to a successful retirement plan is a well-diversified portfolio and that is holding very true today. While we cannot predict nor control the stock market, part of our job is to help remind you of your time horizon and the funds we have in place to weather stock market storms.

Enjoy the links we have attached to this first newsletter, and as always, do not hesitate to reach out if we can answer any questions, allay any concerns, or help make your investment journey as smooth as possible.

Check us out!

## The Myth of Retirement Spending, and Why Reality May Cost Less



It's the question at the heart of so much retirement planning: How much money will I need in savings when I've stopped working?

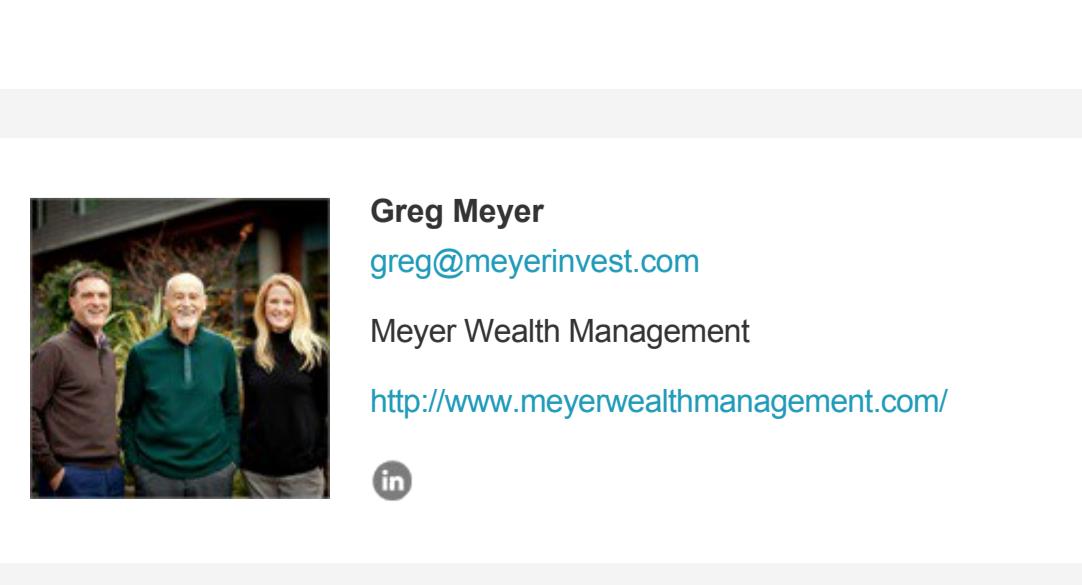
To arrive at that number, many people start calculating an estimate of what they will need to live on each month. The figure they come up with often relies on a popular rule of thumb: the so-called 4 percent rule.

But does retirement spending actually work that way? Do retirees really spend a fixed amount each year for the rest of their lives?

Read here for the full article and to find out why this is or isn't the answer.

Read full article here!

## A Taxing Story: Capital Gains and Losses



Understanding how capital gains are taxed may help you refine your investment strategies.

Learn More

## 14 Facts You Didn't Know About Amazon

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