



We hope your summer is going well. June marked the official start of summer. We also celebrated Juneteenth and Father's Day.

We have shared some valuable resources and blog articles on our website this month. You can find the links to them below. We hope you enjoy reading them!

In other news, we are looking forward to our Summer Beach Bash event on July 30th. If you'll be in town, we would love to have you and your family join us for a fun-filled day. [Click here](#) or the picture below to RSVP! We hope to see you there!



You're Invited!

SUMMER BEACH BASH

SUNDAY, JULY 30, 2023 | 4PM - 7PM



Please RSVP by Sunday, July 23rd

ACCOUNT VIEW 2.0

Account View 2.0 will soon have an updated navigation experience! You will soon have a new updated navigation experience when you log into Account View 2.0. The modern design will provide a simpler and easier way for you to review and manage your accounts. We're sharing a [before/after guide here](#), so you can see what is changing, but feel free to contact us if you have any questions.

Don't have access to Account View 2.0 yet?

No worries! Please request your activation link by clicking [here](#) or the button to the right at your earliest convenience, and be sure to include your name in the request.

Request
Activation Now

RESOURCES



Split Annuity Strategy

June is Annuity Awareness Month! Here is an informative article about the Split Annuity Strategy, which combines two different annuities to generate income and rebuild principal. Find out how it works:

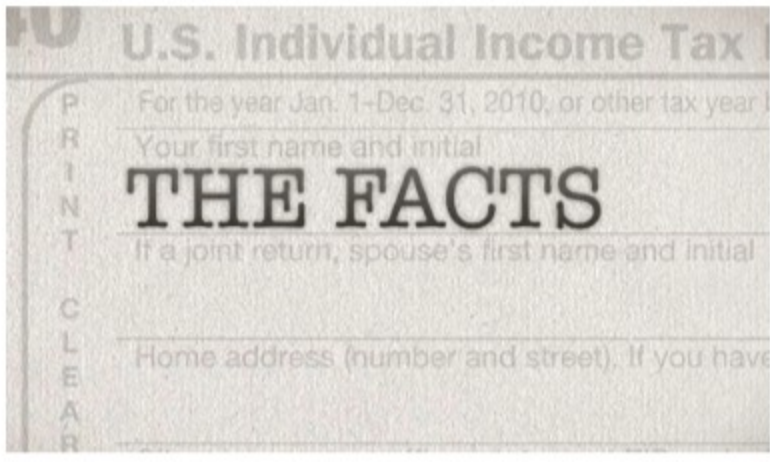
Read Here



Fixed or Variable Mortgage, Which Should You Pick?

To celebrate Homeowners Month, check out our article on fixed and variable mortgages, and learn which may be the right choice for you.

Read Here



The Facts About Income Tax

Millions of people file their 1040 forms each April... but how much do you really know about income tax? These facts may surprise you. Watch a short video here:

Watch Here



Protecting Those Who Matter Most

Insurance Awareness Day is on June 28th. Here is a great slideshow discussing the importance of Life Insurance and protecting your loved ones.

Read Here

ON THE WEBSITE



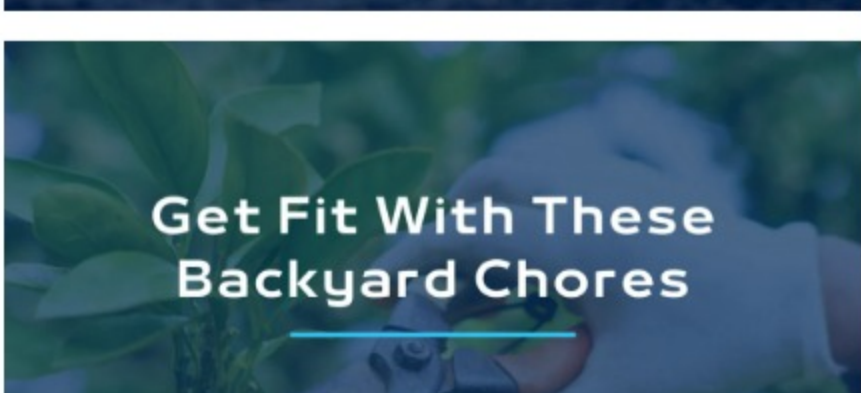
Shifting Income & Tax



The Best Sustainable Lawn Alternatives



Estate Planning: Don't Just Set It & Forget It



Get Fit With These Backyard Chores

Read More Blog Posts

LIFE COACHING

Life coaching is the process of helping someone find the path between where they are **now** and **where they want to be**. We've partnered with Coach360 to provide you with a way to connect with coaches covering various life topics, including but not limited to retirement, empty nesting, relationships, and more. For the coaches, the first introductory meeting is free. After that, if you want to set up additional sessions, you can work with the coach on pricing. You can mention to the coach that you accessed their information through Coach360.

Click here for the sign-up guide, a step-by-step document with screenshots to help follow along:

Sign-Up Guide

YOUR FRIENDS & FAMILY

We provide a value-added service for your friends, family members, and colleagues. **If they are important to you, they are important to us.**

We're happy to be a sounding board for their financial concerns, and utilize our over 70 years of combined experience to help.

Please feel free to send them our contact details or [you can give us their info](#) and we'll be happy to schedule an introductory meeting.

JUST FOR FUN

Red, White, and Blue Flag Toast

4th of July is around the corner!

Here is a quick and easy fun breakfast with an Independence Day spirit.



Click Here for the Recipe

As always, thank you for allowing us to be part of your financial journey.

All the best,
Your StrateFi Wealth Management Team
Jason, Merrick, and Kim



Book An Appointment With:

JASON & MERRICK (Joint Meeting)

JASON

MERRICK

KIM

You Can Also Text

Jason: 775-204-2219

Merrick: 949-997-1886

Kim: 949-997-1868

Note: Texting services are for business purposes only.