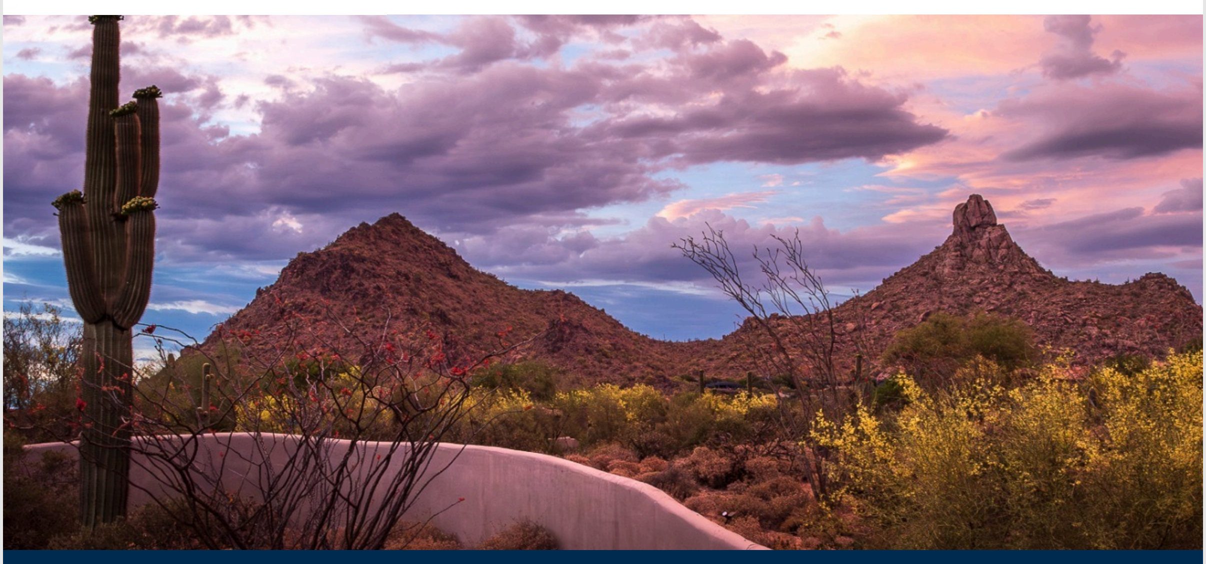


Pinnacle View Wealth Management

Q3 Newsletter 2024

We are pleased to present our quarterly newsletter to you.

As we enter the second half of 2024, we feel it's a great opportunity to share resources that'll help you get the most out of these summer months. Also included in this issue is our team member spotlight as well as some insightful highlights for the quarter. If you have any questions, don't hesitate to reach out to the team.

Team Spotlight:

Jack Regier, CFP®

- Financial Advisor
- Vice President, Wealth Management
- Certified Financial Planner CFP®

Connect On LinkedIn

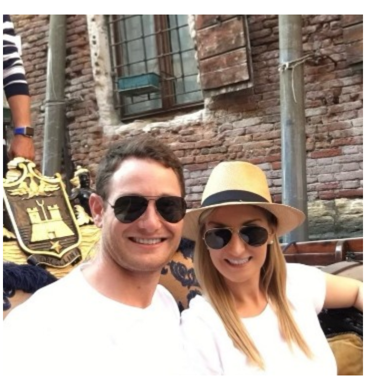
My Role on the Team:

I have been serving my clients as a Financial Advisor at Morgan Stanley for over seven years. I currently hold the title of Vice President and earned the Certified Financial Planner (CFP) designation in 2016. I create customized financial plans focused on an individual's, family's or business owner's needs and help to analyze and implement comprehensive strategies aligned to those goals. I pride myself on prompt and consistent service and being a trusted partner on my clients' advisor team.

Pictured Left to right: Maddie Alcorn, Financial Advisor, Tim Metcalf, Financial Advisor, Stacy Morton, Financial Advisor, Jera Cain, Client Service Associate, Jack Regier, Financial Advisor.

What makes you passionate about work?

When I was in high school, I remember listening to a guest presentation from a financial advisor in my economics class. The advisor shared that if you contributed $5k to a Roth IRA from the ages of 18 to 65, with the compounding of interest, it would turn into $1 million by retirement. This sparked an interest in saving and investing at an early age which turned into a passion to help guide and educate others toward achieving their financial goals.



Family Life:

My wife Kelsey and I both graduated from Santa Clara University in the San Francisco Bay Area and have been married for 7 years. We have two daughters, Charlotte, who's four and a half, and Molly, who will be turning three in August. We also have an eight year old Malti-poo named Teddy. It has been such a joy to have these three in our lives. Each day brings new memories and tons of laughs!

Hobbies & Interests

Outside of work, our girls keep us busy. Charlotte participates in a soccer league and both girls are currently in gymnastics. As a family, we enjoy being outdoors, hiking and traveling. We recently visited Maui and Southern California and are looking forward to more upcoming trips later in the year!

Summer Lifestyle Resources

Activities, Recipes, and Ideas for the Summer Months Ahead

Smart Money Moves When Traveling Abroad

Consider these tips when planning for foreign travel and perhaps save yourself time, money and headaches.

Read More

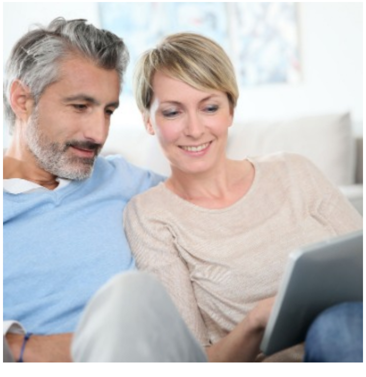
Easy Recipes for Summer

Summer is here! Below is a list of easy and flexible dinners, pastas, salads, desserts and more that will get you excited for the season.

Read More

Insights of the Quarter

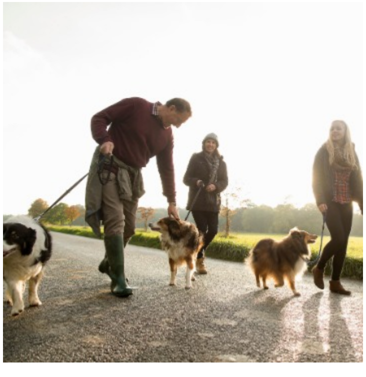
Trending Ideas of the Quarter



Your Mid-Year Financial Planning Checklist

Changes in the market or shifts in your personal circumstances may require adjustments to your financial plan. Here's a mid-year checklist to help get you started.

Read More



Wealth Education for the Next Generation Web Series: Cybersecurity

This session explores the skills that are important to safeguard your online identity and assets, from common cyber threats to learning best practices for secure online transactions.

Watch Replay

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Wealth Management Group
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