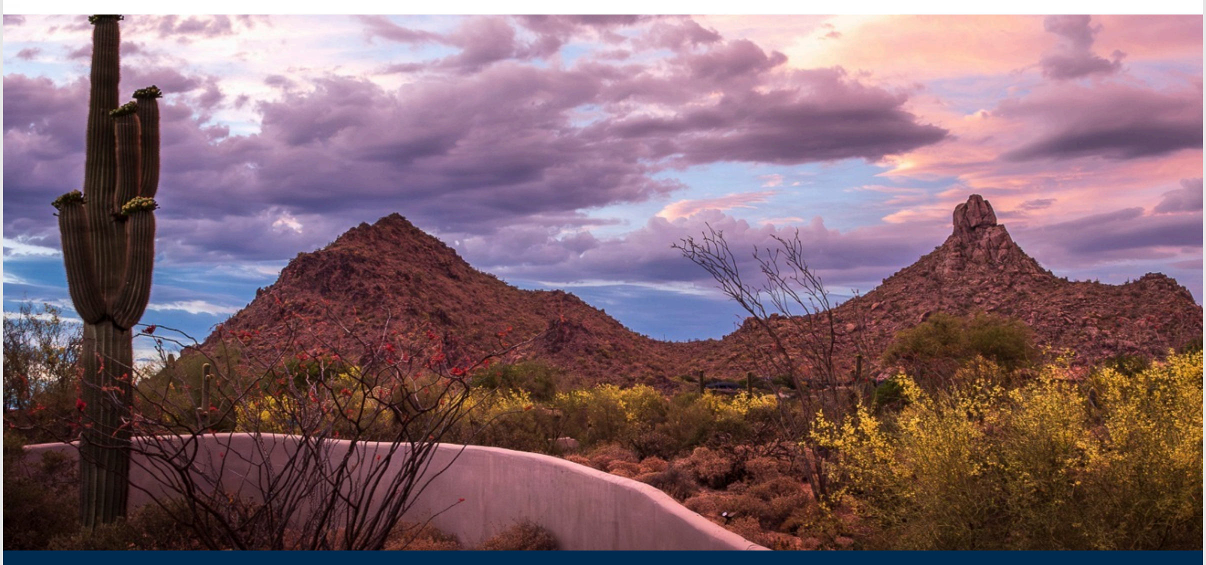

Pinnacle View Wealth Management
Q4 Newsletter 2024

We are pleased to present our quarterly newsletter to you.

This months team member spotlight is all about our wonderful Senior Registered Client Service Associate, **Jera Cain!** You can also find a few insights from the quarter below. If you have any questions, don't hesitate to reach out to the team.

Team Spotlight: Jera Cain

My Role on the Team:
Senior Registered Client Service Associate

I work on the service and support side of our team, where I have new opportunities every day to help our clients with everything from basic day-to-day items to challenges that are much more complex. Internally, I also lead many of the administrative undertakings on behalf of our team. I'm equipped with over 20 years of experience in Financial Services and I am committed to providing only the best of experiences for our clients and also for my fellow team members.

What makes you passionate about work?

My career in Financial Services has kept me inspired and engaged for many years for reasons that actually build upon one another successively. To begin, it allows me the pleasure of being presented with new and interesting things to learn every day. Large or small, the process of exploration and discovery never gets old. Then, inevitably, this newfound knowledge leads to new ways I can help our clients, and our clients are plainly the only reason we get to do what we do. Finally, the gratitude we have the honor of receiving from our clients through the many solid and long-lasting relationships we've built, creates an incredible feeling that keeps me continually motivated.

Family Life:

My immediate family is very small, consisting of myself, my husband Rob and our two cats Roro and Vino. Although small, it brings more happiness to me than I thought possible. We love to spend any downtime at home lounging in our back patio (which we recently redecorated ourselves), coming up with creative meals to make and hosting our friends. Outside of our home, Rob and I love to travel, try new restaurants and hike local foothills in the cooler months.

Hobbies & Interests

My go-to leisure time activity is reading. For me, it provides endless opportunities for learning, but it's also just a great instant escape when I need to get away. My reading list continues to grow and it's definitely outrunning me. At this point, I don't think I'll ever have enough time to read everything I hope to, but that's not such a bad problem to have.

I feel strongly about animal welfare, with my 'adopted' charity organization being HALO – Helping Animals Live On. HALO provides a no-kill safe-haven where extraordinary measures are taken to save homeless pets and protect them from abuse and neglect. I've been a long supporter of their cause, having organized multiple collection drives and spearheaded hands-on volunteer events. Outside of that, and wherever I can, I support environmentally-focused and other animal welfare organizations via charitable contributions.

Fall Insights & Year-End Reminders

Required Minimum Distributions Reminder

It's that time of year again to take your next (or first) required distribution. Make sure to take your RMDs before the due date or reach out to see how we can help you make this an automated process.

Review your Beneficiaries within your MSO Account

Friendly reminder to add or review your beneficiary designations to ensure they are accurate and up-to-date. This is important after a major life milestone, such as marriage, divorce or the birth of a child.

As a Certified Exit Planning Advisor, Jack has deepened his education in the exit space making him better equipped to guide business owners through the process of transitioning ownership, preserving their legacy, and helping to ensure their financial future is secure. Whether it is tax strategies, succession planning, or maximizing the value of a business, he's here to help make the process as smooth as possible.

Building a Family Enterprise That Lasts

Successful family businesses establish a shared mission and succession plan to endure for generations to come.

Read More

The Anatomy of a Deal

What is the best way to sell your business? Given all the considerations that matter to a business owner and potential buyers, there isn't one right way to answer this question.

Read More

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