



Pictured left to right: Christy Wetrich Wealth Management Associate *Financial Planning Specialist, James Baker Financial Advisor, Raegan Wagner Financial Advisor, Matthew Jens Financial Advisor, Stacey Burger Client Service Associate, Tom Hunt, CFP® Financial Advisor, Zach Bouslog, QPFC Financial Advisor, Priscilla Sayeed CDFA® Financial Advisor, Lisette Villalba Torres Client Service Associate.

[Client Preferred Name]

As we transition into the fall season, it's a perfect time to reflect on our financial landscape and prepare for the opportunities and challenges that come with year end planning. Let's embrace the season of change and look to finish the year strong.

September Insights



3Q25 DMG Quarterly Update Call - Markets in 5 Minutes

Date: Friday, September 26th

Time: 9:00am CST

Toll Free: **+1 (877) 777 - 8895**

Participant Code: **2066423**

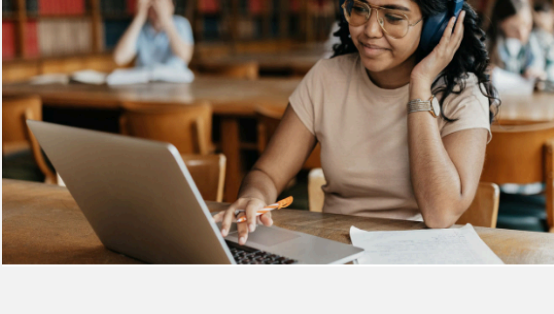
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Quarterly Market Essentials

[Click here to learn more](#)

Cybersecurity 101: Staying Safe at College

College students can be prime targets for cybercriminals. Learn how you can protect yourself and your family.



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How to Choose the Right Life Insurance for Your Needs

September is Life Insurance Awareness Month. Learn how life insurance can help you protect your loved ones.

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Lifestyle

Fall Planning for Your Finances

Learn the money moves you can make this fall to set yourself up for success in 2026 and beyond. Find tips on investing, taxes, charitable giving and more.

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August Happenings: What Have We Been Up To?



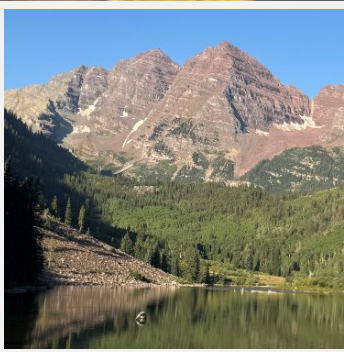
The Hunt Family took their annual trip to Wrigley Field and saw the Cubs play the Pirates!



The Bouslog kids are back to school - Berkley 1st Grade + Bowen Pre-K. But they've been keeping up with their reading, writing and learning all summer long



Most recently, they've mastered their chopsticks skills! And who would have thought a 5 year old would love raw sushi!



Priscilla and a few of her friends hiked the Maroon Bells in Aspen, Colorado.



Reese had a successful 4-H horse show this year at the Iowa State Fair with both her horse and pony. She also had a great ride in the Iowa State Fair Cowgirl Queen Contest this year representing the saddle club Raegan has been a member of since she was 6 years old.



The Wagners spent Labor Day weekend at Twin Lakes (Iowa) at Raegan's parents' cabin...got to enjoy one last beautiful boat ride before closing things up for the season.



[Signature of Primary Contact]

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