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On Course

June 27, 2017

Volume 17, #6

Welcome! Summer is here -- and Sarah Stamp, Sarah Hodge, and I are pleased to share with you our list of reading recommendations for this summer! We hope they provide you enjoyment along with some financial education during your summer days!

If you want assistance enhancing your financial intelligence, remember we're here to help you stay *On Course!*

Jewfee

-Jennifer Lane, CFP

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Summer Reading

Our recommendations for Summer Reading 2017 are below! (Please note that book descriptions are condensed from Amazon's website.)

Money Harmony by Olivia Mellan and Sherry Christie

Why are we so irrational about money? Time after time, it heads the list as the source of conflict and discontent between us and our loved ones. Early money messages and childhood vows, money myths, and gender differences all sway what we think and do - or don't do - as adults. With humor and compassion, simple exercises, and money dialogues, Olivia Mellan and Sherry Christie will teach you how to cultivate a relationship with money that reflects your true values and integrity - and frees you of money anxiety to enjoy the happiness you've earned.

Business Adventures by John Brooks

"*Business Adventures* remains the best business book I've ever read." -Bill Gates, *The Wall Street Journal*

Stories about Wall Street are infused with drama and adventure and reveal the machinations and volatile nature of the world of finance. Longtime *New Yorker* contributor John Brooks's insightful reportage is so full of personality and critical detail that whether he is looking at the astounding market crash of 1962, the collapse of a well-known brokerage firm, or the bold attempt by American bankers to save the British pound, one gets the sense that history repeats itself.

How to Raise an Adult by Julie Lythcott-Haims

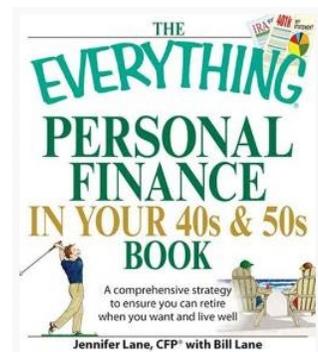
Julie Lythcott-Haims draws on research, on conversations with admissions officers, educators, and employers, and on her own insights as a mother and as a student dean to highlight the ways in which over parenting harms children, their stressed-out parents, and society at large. While empathizing with the parental hopes and, especially, fears that lead to over helping, Lythcott-Haims



Jennifer's Hint

New online resources to help with retirement planning are being created every day. Be sure you use a variety of different online tools and calculators, even if you find one you particularly like. Depending on your inputs, each tool could yield different recommendations. Look for tools that are independent of a brokerage or insurance sales relationship.

Get more tips in Jennifer's book



offers practical alternative strategies that underline the importance of allowing children to make their own mistakes and develop the resilience, resourcefulness, and inner determination necessary for success.

The Seventh Sense: Power, Fortune, and Survival in the Age of Networks

by Joshua Cooper Ramo

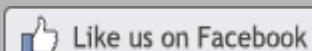
All around us now we are surrounded by events that are difficult to understand. *The Seventh Sense* is the story of what all of today's successful figures see and feel - forces that are invisible to most of us but explain everything from explosive technological change to uneasy political ripples. The secret to power now is understanding our new age of networks - not merely the Internet but also networks of trade and DNA and finance. Based on his years of advising generals, CEOs, and politicians, Ramo takes us into the opaque heart of our world's rapidly connected systems and teaches us what the victors of this age know--and what the losers are not yet seeing.

([click here for link](#))

Helpful Websites

[Amazon](#)

[LetsMakeAPlan.org](#)



Q&A

Q: I love investing and finance and spend quite a bit of time researching and planning. I've just finished our retirement plan. Should I get independent input?

-- Betty, Hull

A:

Betty, finding a professional to review your retirement plan is important. You don't need to spend a lot or even enter into a long-term relationship with an advisor. This relationship could be pivotal; you can't exactly go back and redo your plan once you've reached retirement and discover that you don't have enough money to make your plan work. A fee-only certified financial planner (CFP) might be a good option because they work directly for you and are paid only by you. Because you've done your homework ahead of time, they can be especially helpful in making sure you've considered all the necessary aspects of your plan. Check out <http://www.letsmakeaplan.org/> for help in finding a CFP.

What's New

- Jennifer contributed to *The Wall Street Journal* article "The Biggest Money Mistakes We Make -- Decade by Decade." Click [here](#) to read the article.
- Jennifer recently answered NECN viewer questions about **debt in retirement**. Click [here](#) to watch the segment on her blog.
- Follow us on Facebook! Visit www.facebook.com/AskJennifer and like us!
- Jennifer appears on NECN every other Monday morning at 9:30 am in addition to her Tuesday 7:30 pm appearance.

Compass Planning Associates helps families, individuals, and small-business clients achieve financial security, knowledge, and control over their money. Our **fee-only, client-centered approach** provides education and guidance for achieving financial goals and dreams.

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