Fee-Only Financial And Investment Planning

Make An Appointment

On Course | December 16, 2020 | Volume 20, #13

Welcome! Let me start our final newsletter of 2020 by saying to each and every one of you: Thank you for being our clients.

I started Compass Planning 24 years ago because I thought better money management could go a long way towards building people's happiness and resilience. Money does not fix everything, but managing resources thoughtfully can help make our world, and the world of those around us, a better place.

Together, over the years, we have been through happy times and tough times with our clients. This year has certainly been one of those tough times. With the lock-down in March and social distancing guidelines since then, I appreciate your moving with us to meeting virtually. We've now Zoomed, WebEx'd, Join.me'd, FaceTimed, and conference called with everyone. Your patience in this process has been wonderful. Thank you!

In January and February we welcomed two new team members, Josh Weiss and Theresa Stevens, and, happily, Sharry Li returned as our intern, then joined our full-time staff in May after her graduation from Boston University. Josh, Theresa, and Sharry represent the next generation of financial planners. Thanks for supporting them. The lessons they learn this year will go far in making them exceptional planners in the future.

Early in the year, an older client told me that the pandemic was this generation's World War II. I think she has a point. The uncertainty of how long this is going to last, our worry about our loved ones, and the continuous economic uncertainty has been hard on everyone. I hope that, like the generation that brought us through that war, we can all be made better, more tolerant, and more understanding of each other than we were before.

Here's to a happy, healthy, and better year ahead of us! I know we can get through this together.

Jennifer Lane, CFP

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.

This newsletter and any linked references are for informational purposes only and are not to be construed as tax, legal, or investment advice. Compass Planning has gathered the information from sources it believes are reliable, but your individual situation can vary, and you should consult with your investment, accounting, and/or tax professional before taking any action.

Compass Planning Associates, Inc

Boston Office
Three Post Office Square, Suite 602
Boston, MA 02109
617-523-4666
info@compassplanning.com

Contact Us

Wellesley Hills Office
366 Washington Street
Wellesley Hills, MA 02481
617-523-4666
info@compassplanning.com