

FROM THE CAPITAL

APRIL 2022 | VOLUME 13



New Employee Spotlight

We would like to welcome our newest employee, Allison, to the team. She will be taking on our marketing in addition to secretarial responsibilities. Allison will be the new voice of the phones and looks forward to working with you all.



Allison was born and raised in Colorado. She attended Suffolk University in Boston where she received a degree in advertising and public relations. In her free time you can find her reading, shopping, or exploring a new coffee shop. She is excited to be joining the CFG team.

Spring into Action

As the days grow longer and the weather begins to warm, there are many things to look forward to in the springtime. As you know, Colorado is one of the best places for spring skiing! Now is a great time to take advantage of discounted tickets. We also cannot forget that spring means golf season! It's finally time to tee it up and get those competitive juices flowing. So let us know what your favorite courses are! Finally, spring is also tax time. Don't forget to max out your eligible retirement contributions. If you are unsure on what you are eligible for, reach out to us or connect with your CPA. Make sure to get us your requests by April 11th.

Alex Takes Over

As of January 1, 2022 Alex is leading the CFG Team. He is still executing his duties as the lead portfolio manager, and he is actively adding new tech to enhance and modernize your experience. Dennis, Alex, and John are working more closely than ever to make sure your financial planning and investment needs are managed with the utmost care.

