CFG

FROM THE CAPITAL

Peaceful Resolution

Each New Year brings about New Year's resolutions. We all want to start that diet, exercise more, spend more time with family, or simply get back into some good habits. This New Years marks the beginning of a new decade, an opportunity to draw a line in the sand, a definitive point in time to initiate change. Perhaps this unique period in time will serve as a catalyst for the change you have been wishing to make.

Unfortunately, it has become a something of a joke at how quickly resolutions fade and old habits reemerge. Sometimes the goal is too lofty, sometimes proper support or accountability is missing, sometimes the goal is really not as important as once believed.

In our profession, identifying and defining proper goals is imperative to the long-term success of a plan. Often we encounter kind, hard working people that have well-intentioned goals that are either unhealthy, unrealistic, or unwise. Their plan fails before it even begins.

This New Years, at the beginning of a new decade, we submit that no matter what your goals, no matter what changes you would like to make, there is a common thread that ties us all together in our New Year's resolutions. It is not that we all want to lose a few pounds or learn something new; rather, we are all searching for the same thing. We are all searching for peace.

We want peace with our relationships, our health, and our finances. We create goals to achieve, but really they are all baby steps that will hopefully lead us to the peace that we are all searching for. This year, we would urge you to set your goals not on the fleeting, superficial, or temporal but to pursue peace within your life, and let the rest fall into place!

New Year, New Baby!

New Year's Eve will never be the same for the Leonida family as Cole and Lora welcomed their first child, Levi Dennis, to the world on December 31st. Levi surprised everyone showing up over a month premature. Thankfully, both he and his lovely mom are healthy and enjoying this new phase of life!

What's With All The Letters?

Our team is always looking for ways that we can be better equipped to serve our clients. But do you really know what all those letters mean behind our names? In celebration of Cole earning his CFP® designation, as well ask his CKA® certification, we thought this was the perfect opportunity to share exactly what all those letters mean for you as our client.

CERTIFIED FINANCIAL PLANNER™ professionals must meet the highest requirements in the industry in terms of ethics, education, experience, and exam. All CFP® professionals carry a fiduciary responsibility to clients. Alex and Cole proudly hold the CFP® marks.

Similar to the CFP® designation, Chartered Financial Consultants® are trained in holistic financial advice covering everything from investing and insurance, to taxes and business. Dennis and John carry the ChFC®.

The Certified Investment Managment Analyst® designation is considered the peak international, technical portfolio construction program available. As our portfolio manager, Alex holds the CIMA® designation.

Chartered Life Underwriter® has been the preeminent insurance designation for nearly 100 years. CLUs® are highly trained in the use of insurance strategies for estate, business, and personal planning. Dennis and John both carry the CLU® designation.

Certified Kingdom Advisors® are able to provide Biblical financial advice for clients that hold a Christian worldview. CKAs® specialize in responsible financial stewardship and charitable giving strategies. Cole holds the CKA® designation on our team.

CFG Update

2020 marks a big year for CFG! We will be utilizing a new "whole team service" strategy as well as the transitioning of CFG ownership from Dennis to Alex. We will be announcing more details regarding our CFG Team roles in first quarter of 2020. Even more exciting, we will be sharing details on our future vision for CFG and why it is the very best thing for our entire CFG Family. Stay tuned for more updates!