

July 2021

# Month Ahead

This month we invited partners to cover various topics both macro and micro in breadth that we believe will keep you informed in today's hyperactive climate.

For this month there will be four webinars that will cover diverse topics covering current markets and new ideas to planning on your personal finances.

Our webinars take place every Wednesday at 1:30 PM.

Please join us each week for the presentations and register online today.



**Wellspring Consulting**  
*The Source of Wealth Strategies*

## Trust 102 - How to Use Irrevocable Trust to Pass Wealth to Next Generation

[Register >](#)

**nuveen**  
A TIAA Company

## Tax-Exempt Municipal Bond Market Update

[Register >](#)



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## Biden Tax Plan and Potential Effects

[Register >](#)

## Life Insurance as an Asset Class



## Wellspring Consulting

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We want to welcome clients back to our office safely and continue to be supportive of your needs. Our office has reopened with limited capacity. Visits will be by appointment only.

In an effort to best accommodate clients living farther distances away as well as for ease and convenience, Zoom Meetings will continue to be an option moving forward.

Please connect with your primary point of contact by email or phone for scheduling.

In June, we also welcomed our new financial planner and CPA, Boone Yan. With Boone's five years of experience working with clients on their tax planning needs, we believe his services will further enhance our engagement with investors, whether looking for just tax preparation or a comprehensive personal financial plan.

### Client Portal

[Homepage](#)

Phone: (408) 435-1668

For additional inquiries, please email us [HERE](#).

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