

July 2022

Helping to take
the confusion
out of retirement!



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4th of July Celebrations

After a 2 year hiatus Milwaukee's lakefront fireworks are back. It should be a 45 minute display starting around 9:30 PM on Sunday, July 3rd. There are many other cities around the area back to celebrating the holiday. Grafton and Delafield will have their celebrations and fireworks on Saturday, July 2nd. Beside the lakefront on the 3rd, Menomonee Falls will have theirs. Brookfield, Germantown, Waukesha, Cedarburg, Wauwatosa, and West Bend will all have their celebrations on the 4th. Please look at the [link](#) if you are interested in finding when and where 4th of July celebrations will be happening around you.

If you already have plans for the 4th, whether that is celebrating with family and friends locally, traveling up north, or out of the state, please have a fun and safe 4th of July weekend.

AUGUST EVENTS TO CHECK OUT

As of now the [Brewers](#) are scheduled to play 12 games at home.

8/4- Luke Bryan- [American Family Amphitheater](#)

8/4-14- State Fair- [State Fair Park](#)

8/12- Waukesha Bluesfest- [Naga-Waukee Park](#)

8/17- Milwaukee Night Market - [Wisconsin Avenue](#)

8/18-21- Irish Fest-- [Henry Maier Festival Park](#)

8/18-21- Milwaukee a la carte at the Zoo- [Milwaukee County Zoo](#)

8/20- Bloody Mary Fest- [Deer District](#)

8/26-28- Mexican Fiesta- [Henry Maier Festival Park](#)

Special Reminders:

Do you need a referral for anything? Call us, we would love to help!

If you have any changes to your personal information, please call Ashleigh at 262-408-5820 and she will be happy to assist you!

Would you like to schedule a progress appointment with Jay? Call Ashleigh at 262-408-5820 to set up an appointment.



Wishing all our
clients born in
July splendid
birthday.

Cheers to another
great year!

The celebs celebrating ...

7/3 Tom Cruise turns 60

7/9 Tom Hanks turns 66

7/13 Harrison Ford turns 80

7/16 Will Ferrell turns 55

7/18 Kristen Bell turns 42

7/23 Woody Harrelson turns 61

7/24 Jennifer Lopez turns 53

7/28 Sandra Bullock turns 58

Broccoli Salad

- 8 slices bacon
- 2 heads fresh broccoli, chopped
- 1 ½ cups sharp Cheddar cheese, shredded
- ½ large red onion, chopped
- ⅔ cup mayonnaise
- ¼ cup red wine vinegar
- ⅛ cup white sugar
- 2 teaspoons ground black pepper
- 1 teaspoon salt
- 1 teaspoon fresh lemon juice

A Message From Jay

Greetings and welcome to July!

I spent the better part of the last two weeks of June, traveling to Omaha NE and Boston MA.

The first trip was to Omaha to participate in our in person Field Advisory Council meetings that we hold every six months. I have been a part of Mutual of Omaha's FAC for the last six years. I am part of a six person crew of financial planners from around the country. There are also some frontline managers and some managing directors as well. We meet with our home office partners to discuss and collaborate on how we can better serve our clients. Some of the things we worked on were: Technology updates, enhancing the products and services that we help our clients with and better overall communication. In short, we are constantly looking to provide our clients with a great experience when they partner with us.

I was in Boston towards the end of the month attending and participating in my 24th consecutive Million Dollar Roundtable convention. It's held in the USA or Canada every summer and it's a chance for me to learn from and share ideas with other financial professionals from around the globe.

My goal from attending this annual meeting is to find ways to better serve my clients and to help them feel comfortable about their money and their insurance protection. I want to help people to and through retirement and help take the confusion out of retirement planning as well. Please let me know what else I can help you with.

Enjoy the Fourth of July weekend and remember all of those that have given us and helped us maintain our freedom. God bless America!

Be well,
Jay

Directions

1. Place bacon in a large, deep skillet. Cook over medium-high heat until crisp and evenly browned, 8-10 minutes. Transfer to a paper towel-lined plate and crumble when cool enough to handle.
2. Combine bacon, broccoli, cheese, and onion in a large bowl.
3. Whisk mayonnaise, red wine vinegar, sugar, pepper, salt, and lemon juice together in a small bowl; pour over salad and toss to combine. Cover and refrigerate until ready to serve.



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