

July 2025

Helping to take
the confusion
out of retirement!



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4th of July Celebrations

Milwaukee will not be having fireworks at the lakefront this year, instead they will be having a 45 minute drone show that will start around 9:15 PM. If you prefer fireworks, most of the southeastern suburbs around Milwaukee will have their fireworks and parades on the 4th. This includes Brookfield, Germantown, Greendale, Cedarburg, Pewaukee, and West Allis. Most Milwaukee County Parks will also have fireworks on the 4th too. There are a couple places that will have their celebrations on the 3rd. Those include Menomonee Falls, Muskego, Mukwonago, and Waukesha. Please look at this [link](#) if you are interested in finding out when and where 4th of July celebrations will be happening around you.

Please have a fun and safe 4th of July weekend wherever you may be celebrating!

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 Zach at 262-408-5820 and she will be happy to assist you!

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



AUGUST EVENTS TO CHECK OUT

The [Brewers](#) are scheduled to play 13 home games

7/31-8/10– State Fair– [State Fair Park](#)

8/8– Billy Strings– [Fiserv Forum](#)

8/13-Milwaukee Night Market- [Downtown Milwaukee](#)

8/14-17-Irish Fest– [Henry Maier Festival Park](#)

8/14-17– A La Carte at the Zoo– [Milwaukee County Zoo](#)

8/22-23– Country in the Burg– [Cedar Creek Park](#)

8/23– Shane Gillis– [Fiserv Forum](#)

8/22-24-Mexican Fiesta-[Henry Maier Festival Park](#)

8/25-Linkin Park-[Fiserv Forum](#)

**Wishing all our
clients born in
July a splendid
birthday.**

**Cheers to another
great year!**

The celebs celebrating ...

7/3: Tom Cruise turns 63

7/9: Tom Hanks turns 69

7/13: Harrison Ford turns 83

7/16: Will Ferrell turns 58

7/18: Kristen Bell turns 45

7/24: Jennifer Lopez turns 56

7/28: Sandra Bullock turns 61

Tomato Basil Salmon

- 2 (6ounce) boneless salmon fillets
- 1 tablespoon dried basil
- 1 tomato, thinly sliced
- 1 tablespoon olive oil
- 2 tablespoons grated Parmesan cheese



Directions

1. Preheat the oven to 375 degrees F. Line a baking sheet with aluminum foil; coat with cooking spray.
2. Place salmon fillets on foil; sprinkle with basil. Top with tomato slices, drizzle with olive oil, and sprinkle with Parmesan cheese.
3. Bake in the preheated oven until salmon opaque in center and Parmesan lightly browned, about 20 minutes.

A Message From Jay

Welcome to July!

We certainly had some hot weather the 2nd half of June! Summer is in full swing. I spent 4 days towards the end of June in Miami Beach, FL. It was cooler there than it was in the Milwaukee area. I attended my 27th consecutive Million Dollar Roundtable convention. It was also my 4th, Top of the Table qualification. MDRT is a worldwide financial services organization that focuses on best practices and bringing ideas and education to better serve our clients. It's a chance for me to learn from the best financial planners in the industry, to help our clients even more. MDRT is a unique organization in that people from all different investment and insurance companies come together to share their knowledge. Thousands of financial planners from all over the world get together for this event every summer, somewhere in the USA or Canada.

I attend every year and take time out of my practice to work on my practice so we can incorporate new ideas and services for our clients. One of the most interesting speakers owns a restaurant in New York City and he was preaching "Unreasonable Hospitality". His restaurant, Eleven Madison Park, was named the 50th best restaurant in the world several years ago and he made a quest to get his restaurant to be named the #1 restaurant in the world. It took time, but he made it happen! My team and I strive to provide the best customer experience we can for our clients. If anyone has any suggestions on how we can serve you even better, please feel free to reach out to us. We would appreciate it!

Have a safe 4th of July weekend and remember all of those who fought for our independence and those who continue to protect our freedom.

Be well,
Jay



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