

As we turn the page on a new year, we want to reiterate our commitment to each of our clients.

At Williamson Legacy Group (WLG) our goal is to help you achieve financial peace of mind. We can create a comprehensive financial plan designed to meet your specific goal, but we do not stop there.

Throughout your financial journey, we will be your financial partner to guide you every step of the way. We understand the importance of financial security; we are here to help you get there and remain there.

We will be by your side to help you navigate life's financial decisions that may include:

**Investment management:** we have access to a wide array of investment solutions to help you achieve your financial goals and will help you select ones appropriate for your situation.

**Retirement planning (pre-retirement):** as part of our comprehensive planning process, we will review the retirement savings options available to you and provide guidance in selecting the most appropriate ones.

**Retirement planning (post-retirement):** we will help you determine where to derive the income necessary to support your retirement.

**Tax planning:** we will help you consider the tax impact of the items listed above and will work with your tax professional to suggest tax-minimization moves and help you make the most of available deductions.

**Risk management:** we will help you assess the risks to your financial plan including whether insurance solutions are appropriate.

**Estate planning:** we will help you ensure your wishes are carried out after you are gone. We will work with your estate planning attorney as appropriate.

Other areas where we may help include charitable giving, education planning, major purchases, whether to lease or buy, social security benefit strategies, and any other financial decision you may face.

**Additional Information:** Williamson Legacy Group (WLG) maintains clearing and custody agreements through First Clearing. In addition to having custody of client assets, First Clearing provides account level reporting and documentation including statements and tax forms.

**-Joe Williamson - Managing Director**

*This material is for informational purposes only. It is not a solicitation or recommendation to buy or sell securities. Williamson Legacy Group is a Registered Investment Advisor with the Securities and Exchange Commission ("SEC"). SEC Registration does not imply a certain level of skill or training.*

# WILLIAMSON

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## LEGACY GROUP

**Joseph R. Williamson, ChFC**

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Joe & Maureen attended their first Rubik competition to see their grandson, Silas, do well. It's amazing to see cubes solved in a few seconds. As the month ends, they are making their annual trip south to visit son, Aaron and his wife Jesse in St. Petersburg, Florida.

**Jeanette McCormick, RICP**

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January was all about swim for the McCormick family. High school meets were plentiful as the team prepares for sectionals on February 1st. Noblesville typically does well in sectionals but is always up against Carmel's team, which has won the sectional title for the last 3 decades! Outside of Jeanette's normal dog walking schedule at the humane society, we all stayed inside as much as possible. Those dogs weren't loving the super cold weather either!

**Don Phelan, AAMS®, ADPA®**

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January is always a great time for renewal. The holiday decorations get put away, and Don spends a little more time in the gym trying to melt away all the holiday calories consumed. Don also spent a good part of January completing all of his Continuing Education (CE) requirements to keep my knowledge saw sharpened. With some international travel planned for later in 2024, Don also completed the final component of his Global Entry passport to facilitate easier movement between countries. The end of January allows us to notice that days are indeed getting a bit longer and spring will be here before we know it.

**Ben Hecht, Ph.D.**

Financial Advisor

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We survived January's frigid temperatures by mostly hunkering down at home to enjoy indoor activities as a family, including a few rowdy soccer games in the living room. We made and ate way too many cookies and other baked sweets, you know, to stay warm ;). The kids did manage to coax us outdoors a few times to make snow people and engage in raucous snow related warfare, and none suffered frostbite.

**Owen Williamson**

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I started off the year with a trip to Hawaii for my friend's wedding. Spent the week hiking, hanging out at the beach, boating, and sightseeing. It was a very relaxing way to begin the new year and great to spend time with all my friends. And then I came home to freezing weather!

**Brittany Pelz**

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The Pelz Family has been trying to keep active this winter. Max is gearing up for the upcoming baseball season with weekly batting and pitching sessions. Norah has been busy with a winter indoor soccer league and selling lots of Girl Scout cookies. Caroline is cheering for kindergarten basketball, and is still loving her weekly tap and ballet classes.