

Last week I had the pleasure of attending Davidson Institute, a biennial event that provides continuing education as well as a venue for collaborating with colleagues and sharing best practices. It is a bit like drinking from a fire hose, but it is one of my favorite conferences. The agenda included a broad range of topics including: The U.S.-China Rivalry and Global Fracturing; Is Cash Really King – Why Bonds Should Reign Supreme; Expanding Your Practice Through Advanced Estate and Tax Planning Strategies; Retain Your Brain; Unlocking the Power of AI; Maximizing Social Security Benefits; and Building Brand Relevance, to name a few.

The last speaker encouraged us to examine our “Why,” what motivates us to do what we do. Our Why is ensuring our clients sleep well at night. While we can’t solve all the issues that lead to tossing and turning, we can help make certain financial concerns aren’t the culprits. Financial worries are different for everyone and change as we age. We have conversations with recent college graduates trying to navigate investing in their first 401(k) or how to buy a house. Later that may morph into saving for kids’ college expenses, investment strategies for retirement plans, and/or establishing longer-term financial goals. Over time, philanthropic giving, tax and estate planning, and transferring wealth to future generations come into play. I recently had lunch with a client who had a health scare, and his concern was who would help his wife if he passed away suddenly. We are fortunate at D.A. Davidson to have a wealth of resources to provide solutions for various financial concerns. To make certain we are helping you sleep well at night, see “What Keeps You up at Night” for a brief questionnaire giving you the opportunity to let us know what worries you most. Please take the time to complete it and share with us. We will continue to strive in putting your financial worries to rest, so you can sleep soundly.

Given the ongoing volatility in the market, I thought I’d share this quote I’m attributing to Eliot Janeway. When asked if the market is going way up or way down, he replied, “Yes, but not right away.”

Be well!



“The best ability is availability. When you work with and for the best people in the business and you love what you do, showing up every day is a joy, but more than that, it is a privilege.” -Charlie Cameron

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