PFD
PRIVATE FINANCIAL DESIGN, LLC
*Your Life. Your Plans. Your Portfolio.*

2ND QUARTER 2024

WELCOME TO OUR

# Quarterly Newsletter

*we're so glad you're here!*

A NOTE FROM ANDREW!

## A Warm Handshake

The 35 years have passed rather quickly as I've grown through my career. A significant number of you, 83%, became clients because someone introduced you to me as someone who could help with your financial planning. I am grateful for the privilege and trust placed in me by your friends and relatives who were confident that you would be taken care of and guided as they had been.

Ryan Cummings, CFP®  has been with us over a year now and is a foundational member of Our transition over the next 3 to 4 years. We are looking for some "Warm Handshakes" to introduce Ryan. We're hopeful you can introduce friends or family who can use a brilliant fiduciary to guide them! Please share with us who you feel would benefit, knowing we will take care of them as we have cared for your family and yourselves. If you have any questions about the process or other ideas to share, please feel free to reach out to us!

## New Team Member Alert

WELCOME TAMMY! OUR NEW ADMINISTRATOR

Tammy comes to us with over 30 years of Customer Service Experience. She is Our new friendly voice on the phone and face at the door for Our Clients.
Tammy is here to help Our Clients with their Administrative needs and is a great addition to Our Team!

# April Milestones

***PLEASE JOIN US IN CONGRATULATING MARISSA & RYAN!***

CELEBRATING 6 YEARS
@ PFD IN APRIL!

PROMOTED TO
DIRECTOR OF CLIENT
OPERATIONS!

CELEBRATING 1 YEAR
@ PFD IN APRIL!

# Your Bread & Butter

Money issues are the leading cause of stress among Americans. You can Googlize it! Together we will explore the foundation of healthy and strategic personal finance, and how you are affected by the pressures and the impact of our national and your local economy.

Is this Podcast for you?

It could be if:

- You are starting from scratch in your financial life
- You've made mistakes or are trying to prevent them
- You need a tune-up on your money questions
- You don't know what you don't know, or you just don't know

Each episode, Andrew Beaudry and Ryan Cummings both CERTIFIED FINANCIAL PLANNER™ Professionals, will discuss a wide range of current events that affect you, as well as your financial life choices. Andrew and Ryan will interview a variety of guests, and answer questions submitted by our listeners.

After every episode, you will discover new ways to apply key fundamentals unlocking a clearer financial pathway, which will become a part of your everyday life......making them, ***Your Bread & Butter.***

**Click below to listen!**

**DO YOU HAVE QUESTIONS YOU WANT ANSWERED ON THE PODCAST? SUBMIT THEM HERE**

**INTERACT WITH US HERE**

PODCAST