

WELCOME TO OUR

Quarterly Newsletter

we're so glad you're here!

A MESSAGE FROM THE ADVISORY TEAM
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Why the Client-Advisor Relationship Matters

Financial planning is about more than investments, accounts, or market updates—it's about partnership.

A successful client-advisor relationship works best when both sides are actively engaged. While advisors are responsible for providing guidance, monitoring strategies, identifying opportunities, and helping clients navigate financial decisions, clients also play an important role in the process.

The most effective financial plans are built when clients communicate openly, share updates, ask questions, and stay involved in decisions that impact their future. Life changes such as a new job, retirement, marriage, changes in income, family updates, estate planning changes, or shifting goals can all influence financial recommendations and planning strategies.

Just as your advisor is committed to staying informed, proactive, and available to support your goals, your participation helps ensure recommendations remain accurate, relevant, and aligned with what matters most to you.

Strong financial relationships are built on trust, communication, and shared accountability. When advisors and clients each do their part, planning becomes more meaningful, decisions become more informed, and long-term goals are better supported.

Thank you for trusting us to be part of your financial journey—we value the opportunity to work together toward your goals.



Recipe from Ryan:
Honey Cilantro Lime Grilled Salmon

Sweet, citrusy, and packed with fresh flavor—this Honey Cilantro Lime Grilled Salmon is an easy summer dinner that feels restaurant-worthy without the extra effort.

Ingredients

- 1 salmon fillet
- ½ cup butter, melted
- Juice of 2 limes
- 4 tablespoons honey
- 1 tablespoon garlic, minced
- Salt, to taste
- Pepper, to taste
- Fresh cilantro, to taste

Instructions

1. Preheat grill to medium-high heat.
2. Place salmon on a sheet of foil and create a foil packet, leaving the top slightly open to allow the salmon to brown while cooking.
3. In a small bowl, whisk together melted butter, lime juice, honey, and garlic.
4. Pour or brush the mixture generously over the salmon.
5. Season with salt, pepper, and fresh cilantro.
6. Grill for 15–20 minutes, or until salmon flakes easily with a fork. Baste with additional sauce during grilling if desired.

Serving Suggestions

Pairs perfectly with Mexican street corn, corn salsa, cilantro rice, or grilled vegetables for an easy summer meal.



Recipe from Shannon:
Shrimp Rice Bowls with Spicy Mayo

A quick, balanced bowl that brings together tender shrimp, crisp vegetables, and a creamy spicy mayo drizzle over warm jasmine rice. It's the kind of meal that feels restaurant-quality but comes together in minutes at home.

Ingredients

Bowl:

- Frozen or Fresh shrimp
- 1/2 cup jasmine rice
- 1/4 cup pickled or fresh onions
- 1/4 cup shredded carrots
- 1/4 cup cucumber, diced
- 1 tbsp fresh parsley
- 1 tbsp olive oil
- 1/2 tsp sea salt & pepper

Spicy Mayo:

- 1/4 cup mayo
- 1 1/2 tbsp sriracha
- Juice of 1/2 lemon
- 1 tsp honey
- 1/4 tsp sea salt

Instructions

1. Heat olive oil in a pan over medium heat. Add shrimp, season with salt and pepper, and sauté until fully cooked through.
2. Prepare jasmine rice according to package instructions (frozen or pre-cooked rice works well here).
3. In a small bowl, mix mayo, sriracha, honey, lemon juice, and sea salt until smooth. Set aside.



4. Assemble the bowl: add rice, carrots, cucumber, pickled onions, and cooked shrimp.
5. Top with fresh parsley.
6. Drizzle generously with spicy mayo.

Optional Fresh Summer Toppings

- Avocado slices
- Cherry tomatoes
- Sweet corn
- Bell peppers
- Radishes
- Shredded cabbage
- Edamame
- Microgreens or sprouts
- Choose anything fresh from your garden!



If you're looking for the appetizer that disappears first at every cookout, pig shots might be it. Smoky, savory, and packed with flavor—these bite-sized favorites are always a hit.

Recipe from Marissa: Pig Shots

Ingredients:

- 1 andouille sausage
- 12 oz thick cut bacon
- 4 oz cream cheese (room temperature)
- ¼ cup sour cream
- 1 jalapeño (diced, seeds removed)
- ½ cup sharp cheddar cheese
- ½ tsp Cajun seasoning



Go to Destination from Marissa:

Chapel Falls

Chapel Falls is a 45-foot, three-tiered waterfall tucked inside the Chapel Brook Reservation in Ashfield, Massachusetts. My husband grew up visiting Chapel Falls, and two years ago we brought our youngest son and daughter there for the first time. It has since become a regular item on our 10-year-old's summer must-do list, and he always looks forward to a visit when the weather heats up. The falls feature a series of small cascading waterfalls with natural waterslide-like grooves to slide down into cool bedrock pools that are especially refreshing (and sometimes rather just cold!) on hot summer days. The trail isn't very long and is easy enough for most families, but there are a couple of steeper sections, and the rocks near the water can be slippery, so be sure to tread carefully.

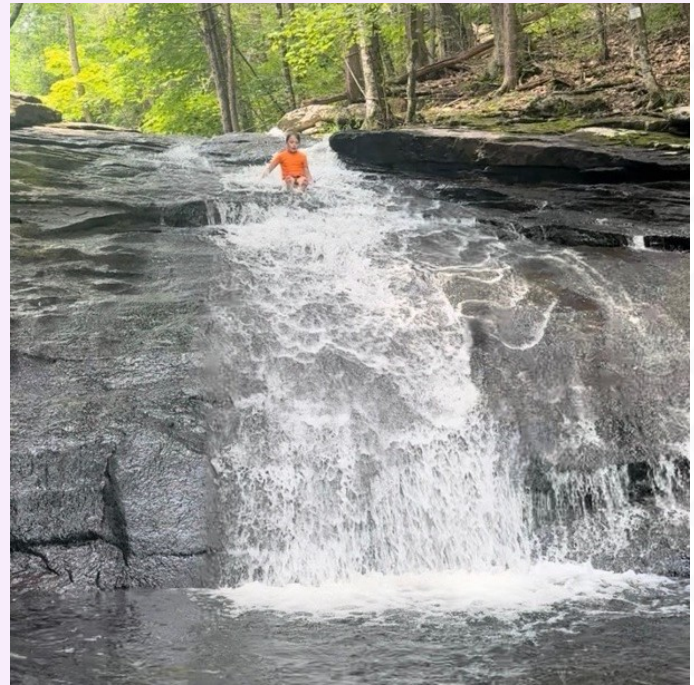
- ¼ cup BBQ sauce
- ½ cup honey
- 1½ tsp brown sugar
- Fresh or pickled jalapeño slices

<https://www.newenglandwaterfalls.com/ma-chapelfalls.html>

<https://thetrustees.org/place/chapel-brook/>

Instructions:

- **Make the Sauce:** Combine BBQ sauce, honey, brown sugar, and Cajun seasoning in a bowl until dissolved.
- **Prepare the Cups:** Cut bacon in half, wrap around sausage, and secure with a toothpick or muffin tin.
- **Mix Cream Cheese:** Combine cream cheese, sour cream, jalapeño, cheddar, and seasonings in a bowl.
- **Fill the Cups:** Transfer cream cheese mixture to a piping bag and fill each cup.
- **Bake:** Top with jalapeño and brush with honey BBQ mixture. Bake at 375°F for 30-40 minutes until bacon is crispy.



Carter enjoying the Falls in
2025



Andrew's Summer Tip: Invest in Memories!

Western Massachusetts Summer Fair & Free Concert Guide – 2026

There's nothing quite like summer in Western Massachusetts—local fairs, live music, community traditions, and family-friendly events happening all season long. Whether you're looking for livestock shows, midway rides, hometown entertainment, or relaxing evenings outdoors with live music, there's something for everyone.

[Summer Fair Schedule](#)

• *Hampshire County 4-H Fair — July 18, 2026*

Held at the Cummington Fairgrounds, this family-friendly one-day event features 4-H exhibits, livestock, local goods, and activities for all ages.

• *Littleville Fair — August 7–9, 2026*

A traditional country fair in the Russell/Chester area featuring livestock shows, local food, and agricultural competitions.

- ***Middlefield Fair — August 14–16, 2026***

Located in the Hilltowns, this historic fair offers pony pulls, petting zoos, exhibits, and a lively midway.

- ***Westfield Fair — August 21–23, 2026***

Held at the fairgrounds on Russellville Road, featuring tractor pulls, agricultural exhibits, carnival rides, and local vendors.

- ***Heath Fair — August 21–23, 2026***

A classic rural Hilltown fair complete with oxen and horse pulls, live music, and family activities.

- ***Cummington Fair — August 27–30, 2026 (FAVORITE!)***

One of the region's largest fairs featuring four days of vintage tractor displays, midway rides, agricultural pulling events, exhibits, and classic fair food.

- ***Blandford Fair — September 4–7, 2026 (Labor Day Weekend)***

A major end-of-summer tradition with rides, food vendors, livestock exhibits, and a demolition derby.

- ***Three County Fair — September 4–7, 2026 (Labor Day Weekend)***

Held in Northampton and recognized as one of the oldest continuously operating county fairs in the country, featuring a large midway, concerts, agricultural exhibits, and entertainment.

For schedules, ticket information, parking details, and event updates, visit the [Massachusetts Agricultural Fair directory](#).

Free Summer Concert Series in Western Massachusetts

Prefer music under the stars? Western Massachusetts offers free outdoor concerts throughout the summer.

- South Hadley — Weekly summer concerts on Thursday evenings at Town Common/Village Commons, plus additional events at Buttery Brook Park.

- Amherst — Downtown Summer Concert Series on Friday evenings at Amherst Town Common featuring local and regional performers.

- Northampton / Florence — Florence Summer Concert Series and additional outdoor performances at Pulaski Park and Brewster Court.

- Easthampton — Millside Music Showcase at Millside Park with family-friendly performances and local food trucks.

- Ware — Community summer music programs held at Grenville Park.

- Leverett — Library Summer Music Series hosted at Leverett Public Library.

- West Springfield — Free concerts at Morgan Road Pavilion featuring tribute bands, classic rock, and country music.

- Westfield — Downtown Live! Friday Night Summer Concert Series at Elm Street Plaza.

- Springfield — Community music events including Friday evening performances at MGM Springfield Plaza.

- Agawam, Chicopee, Holyoke & East Longmeadow — Municipal-sponsored public concert series throughout the season.

- North Adams — Windsor Lake Concert Series on Wednesdays with live music in a lakeside setting.
- Greenfield & Montague — Outdoor music programs held in parks and public spaces.

Western Massachusetts offers a full calendar of summer fun across Hampshire, Hampden, Franklin, and Berkshire counties. From classic agricultural fairs and midway rides to free outdoor concerts and community events, there are plenty of opportunities to enjoy the season close to home.

Quarterly Things to Remember

July 3 - CLOSED
for 4th of July Observance



Andrew's Birthday
August 5

September 7 - CLOSED
for Labor Day



September 14 - September 18
Our Annual Industry Conference

Office will be lightly staffed,
no appts this week

Shannon's Workaversary
September 29



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