xypn invest

Office Hours Summary

May 8, 2024

Model Updates

We previously announced that we will be reducing our short-term bond exposure in the coming months. This week, we presented a detailed plan to roll out these model changes starting in June. Please see the slides and/or the recording for the specific changes and the date when each model will be updated.

Please note that retirement accounts will see the new model fully implemented. Taxable accounts will be implemented as the capital gain thresholds allow.

In our recent Investment Committee meetings, we've discussed changes that will be made over the next few months. In future office hours, we'll share all the specifics, but want to keep you informed on where we're headed!

Orion Tip!

Orion works best in Google Chrome. If you're having any trouble in Orion, please try using Google Chrome.

Important Dates

- ➔ **Office Closed: Memorial Day**
  May 27, 2024

Gone but not forgotten.

Growth Award

Congrats to Chad Burger, owner of Reserve Wealth Planning for being this month's Growth Award recipient. Congrats Chad!

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