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McKinley Carter
MASTER YOUR WEALTH.

SEPTEMBER 2022

Welcome to the 3Q2022 edition of *Currents*! In this issue, we have selected both interesting blogs and insightful videos to share with you, all of which were produced by members of our advisory team. We're confident you'll find much value in this content as you consider your own personal financial situation and "life plan" for 2022 and beyond.

As always, we encourage you to check out our entire blog library, called INSIGHTS, where you can search for a specific topic of interest, or even search for more stories written by your favorite MCWS author. To check out additional videos and other McKinley Carter resources, just click HERE.

If you have any questions or concerns that I can help you with, or if you're wondering if you're on track to a successful retirement, please don't hesitate to contact me. I'm happy to help in any way I can.

Enjoy your autumn!

McKinley Carter Wealth Services
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Making Lemonade from Lemons: How to Get Ahead with Capital Losses

By Joel Estes, CFP®
Financial Strategist | Member of Tax & Legacy Specialized Practice Group

We all invest money for one primary reason—to make money. No doubt, your financial plan outcome hinges on achieving some amount of return on your money you've accumulated. While the whole point of investing is to get a positive return on those resources over your holding period, your success does not rise nor fall on the consistency of price increases. Well-formed financial plans consider not only reasonably anticipated rates of return but also the variability of outcomes. In short, your financial plan should not experience shock from short-term fluctuations in the markets. Learn how to get ahead with capital losses.

Read more

Educate Your Family to be Good Stewards

By Teresa Shawver, FPQP™, CPFA®

Manager of Advisory

Service Standards

Did you know nearly 90% of affluent wealth is lost by third generation? Sound multi-generational planning and education is key to increasing the likelihood that your family will be part of the 10% that "get it right." We are proud of the work we do to help our clients be good stewards of their family wealth to grow for future generations.

[Read more]

Three Skydiving Tenets That Will Help You Achieve Personal Financial Success

By [Frank R. Neiderhiser,CFP®]

Regional Manager and Financial Strategist

What core tenets for a master skydiver's success align exactly with the core principles for successful financial planning? Find out here and start your journey to mastering your wealth!

[Read more]

New Ebook: Missing Chapters in Your Financial Story

By [Brian T. Gongaware, CFP®]
Director of Advisory Services

Is your financial story missing a chapter? Your financial story is the current state of your wealth, and where you are going with it. This ebook will dig deep into what makes up your financial story and how best to organize your goals, so you're better prepared to take those actions that will make a difference in your financial future.

CLICK HERE to download.

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