

Financial Insight

Security For Generations



3rd Quarter 2020

From the Desk of Your President, Eric C. Moleski



“Every End is a New Beginning”

Who would have thought, or predicted, 6 months ago where we are today? Not in my wildest dreams could I have imagined my 31 year old daughter, son-in-law, and their dog moving back in with us to avoid San Francisco rent! I guess as a Financial Advisor, I should be proud of this smart money move... shouldn't I? COVID-19 has altered our world in so many ways—an end to the way we were used to living and working and a whole 'new normal' we are adjusting to today. Here at GEN we have made adjustments to the new conditions.

At the onslaught of the pandemic the entire staff was working remotely from home. We quickly adapted and initiated a more robust communication program. From weekly emails and videos, we've shifted tactics to keep our clients abreast of the global market news in these trying times.

We value in-person interactions and, while we miss seeing you all in person, we are committed to continuing to hold client meetings via teleconferences or Zoom so we can see everyone—even if it's just over the computer!

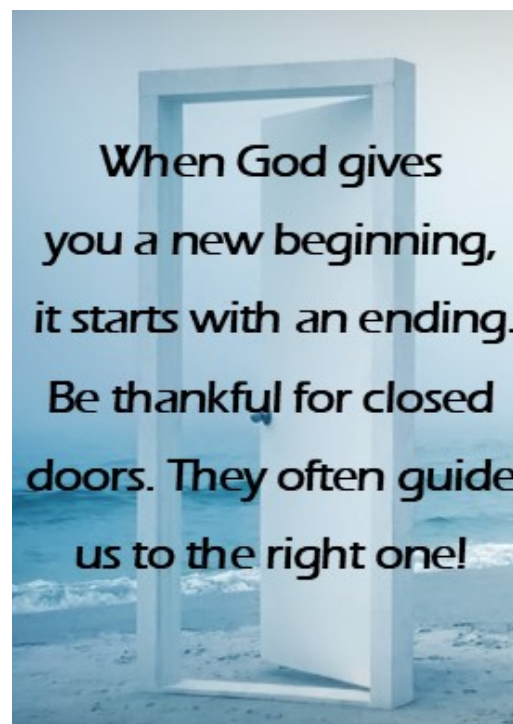
We rose to the challenge and still managed to hold GEN Children's Charity golf tournament. In order to keep our golfers, volunteers, and staff healthy, as well as compliant with COVID restrictions, we had to alter plans and completely revise the format of our tournament. We are very grateful for your support during these times to make the tournament a success raising over \$150,000 for Hospitality House!

While things may never be the same as they once were, as a community we are all finding new and creative ways to connect and adapt.

We are excited to introduce to you, two new employees, Carla and Ty! Their experience and expertise will help enhance our service level. They are looking forward to meeting you soon... whether that be via the phone, Zoom, or in-person. Please see the back page for some more information about each of them.

In July, Bryan and Haley celebrated their own new beginning with the birth of their daughter, June Willow. Everyone is healthy and happy and Brooks is enjoying his new role as “Big Brother.”

We hope you find your comfort in your 'new normal' and if there is anything we can do to help, please let us know.



I have a Tip that can take five strokes off anyone's game. It's called an eraser.

—Arnold Palmer

GEN's New Beginnings

Update: Bryan is a father of two!

Bryan and Haley welcomed their second child, June Willow Vancura.



A Core Value

Creating a supportive and respectful working environment.

We are so fortunate and excited that we have added two new employees to our GEN team, Carla Renner and Ty McMinimee. We hope that you get to know them while as they embark on their new journey with us.

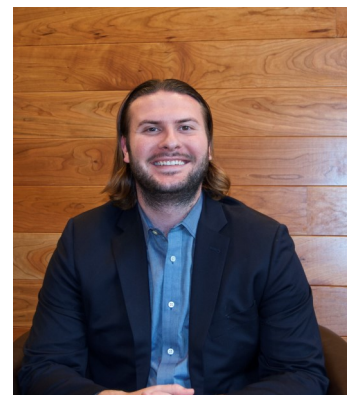


New Faces at GEN



Carla Renner is our new Client Service Associate. Carla has over 8 years experience in the financial services industry and over 12 years of administrative assistant experience. She has 2 children and 5 grandchildren. Carla lives in Plymouth and you may see her riding her bike to and from the office!

Ty McMinimee is our new Investment/Operations Specialist. He came to GEN from another fee-only, registered investment advisory firm. He grew up in Denver, Colorado and graduated from Augsburg University where he was captain of the Men's Basketball Team. He has 2 dogs, 2 cats and enjoys traveling!



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We welcome your thoughts, comments and suggestions regarding our newsletter.
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