

Financial Insight

Security For Generations



3rd Quarter 2021

Market and Economic Update

The theme of 2021 continues to be reopening and recovery. People are finally able to begin returning to a sense of normalcy. This, in combination with the unprecedented level of stimulus, has caused a surge of economic activity across nearly every sector. The markets broadly reflect this optimism as the major indices have continued to march higher.

We continue to monitor inflation, which has perked up this year. We believe inflation will continue to run at above recent levels for some time but are hopeful that it will moderate in the next 24 months. Additional government spending and easy monetary policy has the potential to raise inflation risks.

What should a prudent investor do if they are concerned about inflation? Our short answer is to remain invested in equities. While certain market sectors such as gold, commodities, and real estate can play a part in combatting against inflation, the single best inflation hedge over the long term has proven to be equities. We continue to favor our disciplined, systematic, rebalancing strategy for portfolio management throughout turbulent times. It worked great this past 18 months, the past decade, and we anticipate that it will continue to do so well into the future.

While the past 18 months have been broadly disruptive, we are seeking to take advantage of the turbulence and redouble our efforts to elevate your experience with GEN. We invested in additional team members, new technology and continued learning.

Other News

We are very excited to congratulate Josh for achieving the Certified Financial Planner designation!



We also had some fun this year and have been able to participate in some great charity golf events to support some awesome organizations such as Mercy Ships and Golf for the Gift.





Ecclesiastes 7:11-12

Wisdom, like an inheritance, is a good thing
and benefits those who see the sun.
Wisdom is a shelter
as money is a shelter,
but the advantage of knowledge is this:
Wisdom preserves those who have it.

Certified Kingdom Advisors

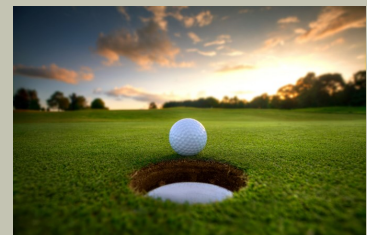
Aaron and Eric have completed the Certified Kingdom Advisor designation. This proved to be a larger undertaking than either had expected. The coursework was rigorous and culminated with a five-hour, proctored exam. Nothing like jumping right into the deep end!

The program is designed to integrate technical experience with biblical wisdom. A verse that we really took to heart comes from 1 Timothy 6:17-19, "Command those who are rich in this present world not to be arrogant nor to put their hope in wealth, which is so uncertain, but to put their hope in God, who richly provides us with everything for our enjoyment. Command them to do good, to be rich in good deeds, and to be generous and willing to share. In this way they will lay up treasure for themselves as a firm foundation for the coming age, so that they may take hold of the life that is truly life."

In our role as wealth advisors, we feel it is crucial to maintain the central focus that God owns it all and we should strive to serve him with our finances. The way we interact with money impacts our relationships with everyone we encounter. The ability to focus on eternal goals and perspectives rather than solely on accumulation and consumption has become part of our DNA at GEN. It is so encouraging to be a part of your lives and to observe all that you do to impact our communities and the world.

We remain excited to help guide and counsel our clients to achieve their individual goals, steward their resources well, and maximize their impact both today and for eternity.

"Success in this game depends less on strength of body than
strength of mind and character." -Arnold Palmer



*Materials discussed in this newsletter are meant for informational purposes only.
Always seek professional advice before making any decisions.*

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