

SUMMER 2020

SC PARKER LLC

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- ◆ Log into your Cadaret Grant/Pershing accounts.
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REMINDER:

Contribution checks to your Pershing accounts need to be made payable to **PERSHING LLC**. Cadaret Grant can no longer accept checks payable to them.



The Research Committee

MARKET UPDATE

It turns out that things can change quickly, no?

We were ready to put out this newsletter earlier in the year, talking about how strong 2019 was both on Main Street and Wall Street, with trade deals being made to provide even more economic fuel. That was just about the time things were beginning to percolate with Covid 19 news and a few weeks later the worldwide economy was shut down! The economic damage was enormous (and hopefully mostly temporary). Governments around the world have put in place massive programs, especially in the U. S., to help ease the economic stress and be a bridge to more normal footing.

Some things may change permanently – more work from home, more video conferencing, more take out, etc. We are and will all be adjusting our investment strategies and themes as things unfold. We are cautiously optimistic that Americans will adapt, as they always have, and the economy will return to a growth path.

The 2nd half of 2020 promises to be interesting on the political front. Volatility is likely to continue. However, historically, the market is more driven by earnings and economics than by election year politics.

As always, the most important thing in all of this is to make sure your investments are of the highest possible quality and are matched to your investment goals and risk tolerance profile. We constantly review the investments in your portfolios and stand ready to answer any questions or concerns you may have about how current events and changing economic conditions may affect your investments. Here's to a happy, healthy & profitable second half of 2020!

SC PARKER LLC

5892 Main St.

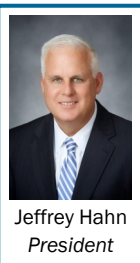
Williamsville, New York 14221



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A MESSAGE FROM JEFF

There is no doubt that our world has changed dramatically in the last few months. But we also recognize that change comes in many forms and that it is inevitable. Staying ahead of the change and embracing it to create benefit for you is part of our commitment to you. Now more than ever, we want to thank you for being a part of our firm — the most important part, actually. We are grateful for your trust and confidence and honored to be able to serve you. As an essential service, we have been working every day throughout this challenging time.



Jeffrey Hahn
President

Over the last year and a half, we have taken a series of steps to modernize our firm in order to better service you, now and in the future. We now have new, more advanced technology, an updated company structure and ownership with a new website and more secure systems in place. More recently, we have put measures in place to make your experience with us safer and more secure.

Today, our youngest clients are less than a year old, our oldest over 100. They reside in over 25 states. In many cases, we are working with third and even fourth generations of some families. We are helping clients just getting started and those of substantial means. Investing can be a lifelong activity. My dad got me started when I was 12. It is an opportunity available to everyone. Our hope is that you will let us help you every step of the way.



RECIPE FOR FINANCIAL SUCCESS

1. Build a clear vision of what you would like to accomplish financially.
2. Become more familiar with the investments you own.
3. Improve the quality of your investments.
4. Simplify your financial life so that your investments work harder and smarter for you.
5. Consider implementing an investment account funded by systematic contributions.
6. Minimize or eliminate your debt load.



SAVING FOR COLLEGE

In many ways, investing for college is the same as investing for other reasons. We are trying to build a quality investment portfolio and make it grow. Certain tax advantaged plans including 529 College Savings Plans are available. We will gladly meet with you to review the various options to help you make a decision that is best for you and your family.

FUN FACTS

The US Treasury says that Americans hold about \$15 billion in loose change!

If at age 22 you started investing \$20 per week you could have as much as \$331,553 by age 67.

2020 IS A NEW YEAR A MILESTONE AT THAT!

A Census year, an Olympic year and a presidential election year are all wrapped into these 366 (leap year) days. Add into that a global pandemic and it has become a year like none other in our lifetime. Is it also a milestone year for you? Will you have an event which will influence your finances? Birth, death, employment, retirement, and significant attained ages all can have major impacts on your personal financial situation. Marriage, divorce and adoption will also change your planning needs. As a commitment to yourself, set aside some time during this time of reflection to examine where you are financially and what steps you are taking to reach your goals. We are here to help you and can assist you in the analysis and modification of your current situation. Be it a beneficiary change, qualified plan contribution change, gifting or investing, we can determine what works best for you and see that the necessary paperwork is completed to insure proper alignment with your wishes. Make this year the year you improve your financial vision to 2020. Stay healthy and don't hesitate to contact us with any questions.



David Ivancic



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SCPARKER.COM

SC Parker's
Annual Shred Event
Details Coming Soon!!!



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