Aventail
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RE: Client Communication #1

Dear Valued Client,

As 2015 comes to a close all of us at Aventail Wealth Management hope that you and your family have been well. There are many exciting changes that are occurring now and will really hit full stride in 2016.

One change is the document that you are reading right now. We feel clients should always have up to date and useful information. The officers of the firm will write recommendation papers, future topics will include Avoid This IRA Pitfall, Getting the Most Out of Social Security and Focus on the Big Picture.

Each month there will be a new paper and we'll keep up on the site the past three. We feel you will find a huge benefit from these. Of course, if any topic really catches your attention you have an open invitation to come in and meet with us to discuss in great detail.

We truly have one ultimate goal and that is to help you find and maintain a lifetime of financial comfort. These articles that are filled with valuable information are just one of the many ways we go about achieving our goal.

Be on the lookout for Client Communication #2 when I tackle the issues that may impact portfolios due to the fact that domestically we are facing a rising interest rate environment and it appears probable that it might continue for many years. We know how to hedge away some of the interest rate risk and we will share that in the next article.

Best regards,

Brian C. Ulch, MBA CES

May Lose Value – Not FDIC Insured – Past Performance Does Not Guarantee Future Results