NOVA
WEALTH

RetireNova.com
July 2024

Nova News

PREDICTABLE. SUSTAINABLE. INCOME.

Nova Wealth Celebrates ONE year!

On June 25th, Nova Wealth celebrated its first anniversary! Our primary goal in creating Nova Wealth was to articulate our dedication to the retirement income distribution planning process. Although we work with many different types of clients, throughout the many different phases of their lives, we truly feel that we do our best work by helping individuals who have saved for retirement execute a plan for spending, and providing them oversight and monitoring through all of their life changes throughout their retirement. "Helping you create Predictable, Sustainable, Income." Across the board, everything "NOVA" was designed to be cleaner, more modern, and more approachable – and represent the feeling of bright futures, as implied by the name "Nova" as our clients enter retirement for what we hope to be the best chapter yet!

As we look forward to the year ahead, we will continue to monitor all facets of our business to ensure that you continue receiving the support we feel proud of and access to products that will best help your plan.

We can't thank you enough for your continued support through introductions to your family, friends, and colleagues. It truly is the best compliment you could give, and because of it, you have all been such a large part of our continued growth. Currently sitting at $185 million in AUM (Assets Under Management), we are eyeing $200 million and looking forward to celebrating with you all when we do!

Thanks to our clients, the following communities have been supported through our events over the last 12 months:

- Toys for Tots (Holiday Brunch 2023) - 100's of toys were donated for children in need
- Santa's List (Holiday Non-Profit Drive 2023) - $4,750 donated to St. Jude
- Feed More WNY (Shred Event 2024)- $1,000 in donations and over 80 lbs of food

We are looking forward to all that YEAR 2 has to offer!

Planning Services Spotlight

OUTSIDE INVESTMENTS/ WORKPLACE RETIREMENT REVIEW

$125/ Account

Using a combination of risk software and MorningStar© we will work with you to evaluate current holdings in the account, and options available in the plan and present a recommended portfolio

Clients often have questions about the allocation of their 401(k) or other employer-type plans and seek guidance and help. Most of the time, we can assist them directly with the assets. Other times, we can't. We have a solution for those instances where the plan should, or has to, stay put. Reach out and let us help!

UPCOMING EVENTS

With the Summer in full-swing, be sure to keep your eye out for our upcoming events!

Wednesday, July 10th - Advice Works Workshop 11:30AM REGISTER NOW

Special guest Jason Berghold will be in the office to answer all your questions on Advice Works, including how to navigate your account information and use the file-sharing feature. Please bring your own device and login information.

Wednesday, August 14th - Summer BBQ 5:00PM REGISTER NOW

Food from Dinosaur BBQ, Buffalo Tap Truck serving up drinks, and entertainment by After Affect! *REGISTER by July 24th for a Nova Wealth t-shirt!

Formal Invitations for all events above will be sent by email

We will be hosting a market update interview with one of our strategists later this summer - the video will be posted as soon as it's available!

We are already halfway through 2024. If you haven't adjusted your employer plan contributions yet, now is the perfect time to reassess it.

Take a look at Jeff's video detailing the new limits for 2024!

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