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Lakeside Legacy Wealth Advisors News

Winter 2023

Lakeside Legacy Wealth Advisors

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Let's connect

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Happy to be in our new home

Thank you so much to everyone who attended our open house this summer. It was such a fun afternoon of connecting with local clients and friends and meeting some of our new neighbors. We're so grateful to everyone who stopped by to see our new building.

Additionally, our new Lakeside Legacy Wealth Advisors location was officially welcomed to the Lino Lakes community on June 22 with a ribbon cutting ceremony by the Quad Area Chamber of Commerce. While our founding financial advisors have been part of the Lino Lakes community since 2011, we were honored to reestablish our roots in this way.

Get to know Steven Popowitz

Have you met Steven Popowitz, our licensed office professional? Steven has stepped in to fill a crucial role for our growing team—working alongside our financial advisors as a fully licensed team member. He is licensed in insurance and securities and oversees our forms, electronic applications and DocuSign technology. You can expect to see these documents come from Steven in the future, and he can answer any of your questions about them.

Steven is a great resource if you have questions about your accounts, and he can often help you if your financial advisor is in a meeting or on a call. He is also well versed in insurance and can answer questions about your current or potential policies. In addition, Steven can send out funds and initiate transfers. And if you are rolling over an account, he will likely be on the call to assist you.

Rob the robomower

If you drove past our office this summer, you may have noticed our newest "team member," Rob, keeping our lawn in tip-top shape. Rob, short for Robert Hector Robot, is our bright orange robotic lawn mower, and he has been a popular topic of conversation around the office. Whenever Rob gets stuck, runs into a tree, loses battery power before making it back to his charging base or looks like he is headed straight into Hodgson traffic, we are quite entertained.

Like many of our beloved clients, Rob is a snowbird and is currently enjoying the weather in a warmer locale. We look forward to welcoming him back this spring, just in time for many of your biannual Thrivent meetings.

Don't miss our client appreciation event

We're bringing back our client appreciation movie experience where we host a family-friendly movie viewing at the theater in White Bear Lake. In early spring, look for more information and a link to secure your tickets. We can't wait to host this event again; it was always so much fun!

No products will be sold.

Retirement account considerations for 2024

As we approach the new year, you may want to review this **simple guide to the many types of retirement accounts**, which includes catch-up limits and other key contribution requirements for 2024. It also has information about retirement savings options and diversification. If you'd like to discuss your retirement savings further, simply give us a call to set up a meeting.

Cold weather tip

Change the direction of your ceiling fans.

Switching your ceiling fan to run clockwise during the colder months will create an updraft that redistributes warm air from the ceiling to the rest of the room. This can lead to energy savings and lower utility bills.

Recipe

Abby's chocolate chip banana bread

A Lakeside Legacy favorite

Our office professional, Abby Nelson, loves to bake and often brings treats to our team meetings. One of our favorites is her chocolate chip banana bread. Here is the recipe. Let us know what you think.

Ingredients

¾ cup butter
3 eggs
2 ⅔ cup flour
1 ½ cup sugar
½ tsp. salt
1 tsp. vanilla
1 ½ tsp. baking powder
4 mashed bananas
1 ½ tsp. baking soda
2 tbsp. milk
Lots of chocolate chips
Walnuts, optional

Directions

1. Cream butter with sugar, then eggs and mashed bananas.
2. Dissolve baking soda into milk and add to banana mixture.
3. Add flour, baking powder and salt to the mixture.
4. Add vanilla.
5. Divide batter into three greased bread loaf pans.
6. Bake for 35 minutes at 350 degrees.

Notes

- Line bread pans with parchment paper on the bottom to avoid sticking.
- Measure the chocolate chips with your heart—you can't have too many!

How we work together

Your goals are at the center of the experience. Just as your needs may change, so should your financial plan. Developing your financial plan starts with goal development and getting to know your current situation. You decide the level of advice with additional options like solutions-based strategies, managed accounts and Dedicated Planning Services. Collaboration helps us stay focused on what's important to you as we:

Understand
Where you are today and where you want to be tomorrow.

Strategize
Based on your unique situation.

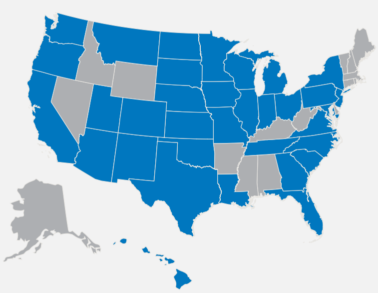
Implement
Solutions that reflect your priorities.

Adapt
To life changes and celebrate progress.

Refer your friends and family

Thank you for referring your friends and family to us. We are so grateful for your support. With our new space and growing team, we have even more capacity to take on new clients and would be happy to connect with the people you care about. If you enjoy working with Lakeside Legacy Wealth Advisors, please consider recommending our services to your colleagues, friends, etc.

We have found the most successful way to refer people is for you to ask them if you can share their contact information with us. That way, we can follow up with them directly and they'll know to expect a call from us.



Our team serves clients nationally and is licensed in:

AZ	GA	IN	MI	NC	NM	OR	TN	WA
CA	HI	KS	MN	ND	NY	PA	TX	WI
CO	IA	LA	MO	NE	OH	SC	UT	
FL	IL	MD	MT	NJ	OK	SD	VA	

As of May 2023.

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