

**ECON WEALTH
MANAGEMENT**

EWM QUARTERLY NEWSLETTER

JULY 2026

ICE CREAM SOCIAL



*Real.
Active.
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4755 Linglestown Road
Suite 204
Harrisburg, PA 17112

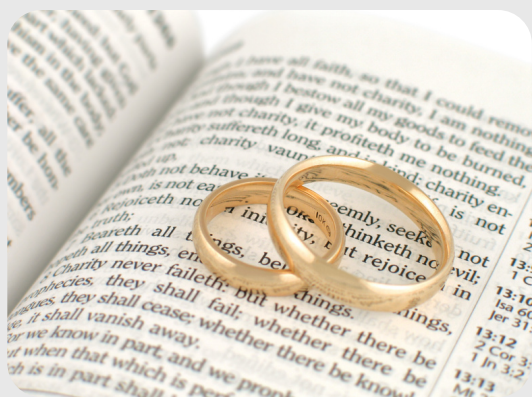
717.545.5870
www.econwealth.com

Thank you to everyone who joined us for our 5th Annual Ice Cream Social. It was a great afternoon with our clients & friends while enjoying some ice cream and great conversation. We look forward to seeing you again at future Econ Wealth Management events!



CELEBRATING LIFE'S MILESTONES

At Econ Wealth, we are honored to celebrate life's special moments with our clients and their families. Congratulations to those who recently welcomed a new baby, celebrated a wedding, or graduated from high school or college. These milestones mark exciting new beginnings, and we wish you continued happiness, success, and many wonderful memories in the years ahead.



PLANNING FOR WHAT'S NEXT

Major life events often bring new financial opportunities and decisions. Whether you're growing your family, starting married life, or helping a recent graduate build a strong financial foundation, our team is here to help. Contact Trisha to schedule a meeting and discuss how these important milestones may fit into your financial plan.



EDUCATIONAL WEBINAR SERIES

We are committed to providing our clients with valuable educational opportunities and timely market insights. This spring, we hosted two webinars featuring guest speakers from First Trust. In March, Frank Siemon shared his expertise and perspectives on the current investment landscape. In May, David Rutherford provided thoughtful commentary and valuable insights in maintaining a positive outlook and challenged us to be better people each day. Check the upcoming events section and our website for more information on future webinars.



CHARITY GOLF OUTING

Econ Wealth was proud to sponsor and participate in the Caitlin's Smiles Golf Outing, supporting an organization dedicated to bringing smiles, hope, and encouragement to children facing serious health challenges. We are honored to give back to our community and support the meaningful work Caitlin's Smiles does for local families.

STEVE'S THOUGHTS

Please click [HERE](#) to read EWM's owner Steve's blog, that is published each month. We hope you take the time to read Steve's perspective on: "It is time? No one knows, so plan today".





CELEBRATING NEW RELATIONSHIPS

At Econ Wealth Management, we are grateful for the trust and confidence our clients place in our team. Thanks to your continued support our firm continues to grow. To welcome new clients and strengthen the relationships that are at the heart of what we do, we recently hosted a New Relationship Dinner. The evening provided a wonderful opportunity to connect, share conversations, and learn more about the goals of those we are privileged to serve, while listening to Sam Stovall from CFRA Research.

If you would like more information on how you can be invited to the new relationship dinner, contact a member of the EWM team.





CLIENT SPOTLIGHT



We are proud to share that Scott Barton, the son of one of our clients, was recently featured in The New York Times ([click here](#)). Diagnosed with cancer of the larynx at age 28 while studying choral conducting at Penn State, Scott underwent treatment that saved his life but permanently changed his voice. Despite these challenges, he persevered and continues to teach choral music today. His story is an inspiring example of courage, determination, and finding purpose in the face of adversity.



NEW EWM TEAM MEMBER

We are excited to officially welcome Alex as the newest member of the Econ Wealth team! We are proud to share that Alex recently passed his Series 65 exam, an important step in his professional development. Please join us in giving Alex a warm welcome in his new role as a Wealth Associate!



We hope to see you at one of our fun, meaningful & engaging events! Please check out our website [HERE](#) for dates & more information.

- September- Coffee Club
- October- Educational Series Webinar
- November- New Relationship Dinner



For your planning convenience, please note that our office will be closed in observance of these remaining holidays:

- Independence Day: July 3rd
- Labor Day: September 7th
- Thanksgiving: November 26th & 27th
- Christmas Eve: December 24th
- Christmas Day: December 25th
- New Year's Eve: December 31st

MEDICARE INFORMATION SESSIONS: HOSTED BY ANGIE DIFLORIO



Date: Saturday, July 18th 9:30 - 11:00 a.m.

Location: Christ the Saviour Orthodox Church Fellowship Hall
5501 Old Locust Lane Harrisburg 17109

Date: Saturday, September 19th 12:00 - 2:00 p.m.

Location: Word of Grace Fellowship Hall
3814 N. Progress Avenue Harrisburg 17110

Please RSVP directly to Angie via
text (717-991-3001) or email (admdsvcs@gmail.com).

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