

December  
2022

# Econ Wealth Management

## 2022 Christmas Letter



A Message from Brian

### The Year of Transition

Your improved 2023 experience is on its way!

Christmas is always a time to reflect, and I would argue that no one is more sentimental than me. My memories of growing up always flood my mind this time of year. I'll share one memory in particular that is fairly meaningful. I remember sitting together with my family on the couch watching "The Facts of Life". I'm certain that many of you remember the theme song as I do. "You take the good, you take the bad, you take them both, and there you have... the facts of life."

Nothing could be more relevant this year than to think most of us have experienced the past good times as investors, but this year we had to "take the bad", so to speak. 2022 was not an easy year, but we made it! We were always confident that we would and we are thankful that you've stuck with us. We are excited to think what 2023 has in store and wanted to give you a sneak peek into how we believe, as your fiduciary, you may find your client experience even more enjoyable than it's already been.



Our website (home page seen above) was recently updated with new features, easy access to information, and a fun look! Visit the new site at [www.econwealth.com](http://www.econwealth.com) and let us know what you think!

We have spent a lot of time developing and implementing new features that we are confident you'll see the benefit in. I've been fortunate to learn from a great friend and mentor, in Steve, who has bestowed upon me the task of leading the younger generation at EWM to provide you, our clients, with the best experience possible. As such, throughout the rest of the letter, the team will provide you with a more in-depth look at what's to come, including the following:

- A newly updated client portal that includes an app.
- An enhanced meeting experience with the financial planning team.
- New strategies employed by our asset management team to even better fit your needs.

I look forward to leading you and the team in 2023. Cheers to a blessed Christmas and all the good the New Year has to offer!



Your EWM Team. Front Row Seated- L to R - Karen Economopoulos, Gabby Binando, Trisha Zellers  
Back Row Standing - L to R - Ryan Troup, Steve Economopoulos, Jake Artz, Brian Zellers

A Message from Jake

### Newly Designed Strategies

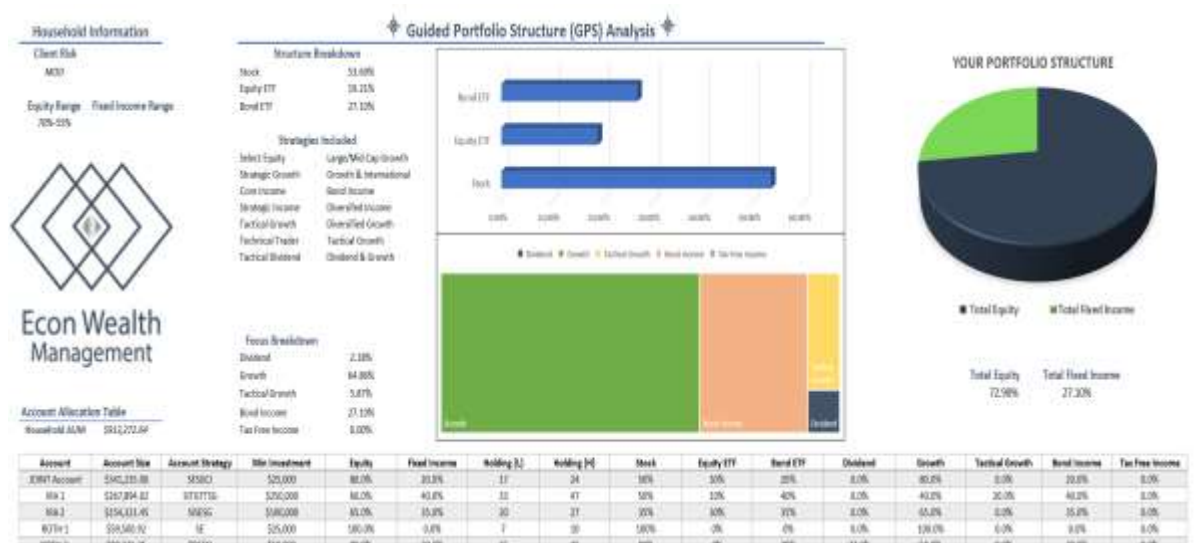
Guided Portfolio Structures will offer more personalization

After working with Brian and Steve and the team for the past two years, I am blessed to now be with EWM full time. As a licensed advisor and helping to lead the asset management team, I enjoy managing portfolios and providing guidance through market fluctuations. I am looking forward to what 2023 has to bring and continuing to get to know all of you better over the coming years.

The end of the year is often an extremely busy time for the Econ Wealth Asset Management Team [AMT] as we analyze what positions we want to keep or sell heading into the new year. Our process takes into consideration both gains and losses, as well as how we feel the positions will perform over the next 12-18 months.

As new technology makes trading and tracking information more streamlined, we have decided to manage investments in a sophisticated and more customized manner. We have created 11 strategies that can be combined into accounts based on several factors. We will utilize your annual review meetings to gather information that will help the AMT to better understand your goals & investment needs. This entire course of action will help to build your Guided Portfolio Structure (GPS) for 2023.

2023 will be an exciting year. I hope that you have a blessed Christmas and that the New Year provides you and your family and friends with wellness and happiness.



A look at our custom report to show blended strategies within your Guided Portfolio Structure. (Picture above is for educational purposes and is hypothetical in nature. It may not reflect your personal holdings.)

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A Message from Gabby

## A new client portal is coming your way! Easy access with an app!

It's been a wonderful year as your Client Experience Professional at Econ Wealth. I enjoy being able to help with account openings, updating account information, any of your deposit and/or withdrawing of funds needs, online access and much more. Look for me in my new office where I will be making sure that all your personal and account information is up to date. Stop by if you have any questions, or even if you just want to say hi! Have a very Merry Christmas and a Happy New Year!

Like Brian suggested, there are many new features available to our clients to make your experience even better. One of these you'll begin to find beneficial early in 2023.

We are very excited to announce our new client portal platform through Advyzon! This new client portal comes with an app that can be downloaded to your smartphone or tablet to view your account(s) at your fingertips. It also comes with the ability to share documents with EWM through a safe and secure electronic portal. Be on the lookout for more information to come about getting your new portal set up. The team and I will make sure that you have access to this when the time comes in March and April of 2023.

Please be aware that the current portal through Morningstar will no longer be available after March 21st of 2023. If there are any documents that you would like access to, please download them and save them for your records before the end of March. If you have any questions, please call the office, and I will be happy to help answer any questions.



Our new client portal, Advyzon, offers a convenient mobile app to easily access all of your information.



Our new lobby area out front provides a warm and inviting place to sit and chat with the team while you wait for your meeting to begin. Enjoy a cold drink or some hot coffee or tea. Stop by and check it out for yourself!

A Message from Trisha

## A new look in Linglestown Your entire meeting experience is getting a makeover!

It's been a great year getting to know many of you, as your Client Experience Associate, since I joined the EWM Team. From planning events, to speaking with you for special occasions, I am very fortunate to be involved in your relationship with the team.

Looking forward to 2023, with our newly updated lobby, you'll be able to enjoy some light refreshments ahead of your meeting or just stop in to say hi and have some coffee! We have plenty!

Hopefully by now, you've seen your invitation to our Christmas Party on December 15<sup>th</sup>. After a two year pandemic hiatus, our Christmas party is back in full force and will be held this year at the beautiful Linglestown Historical Venue right in town. We hope to see you there but if not, we wish a Merry Christmas and will see you sometime in 2023!

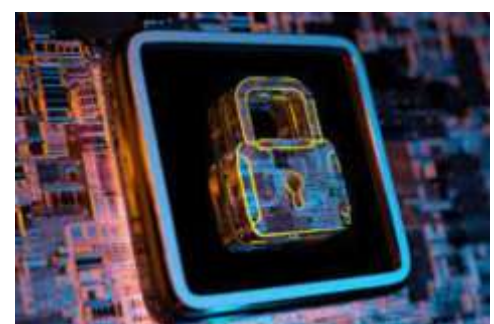
A Message from Ryan

## Here to support your needs and keep your information safe

### Cybersecurity Education in 2023

I am thankful to be one of the team's licensed advisors, I spend my time helping build financial plans, supporting the asset management team with trading, and monitoring our cyber security program. My goal is to make sure each client gets the best experience possible.

In 2023 I will be working to educate clients on ways to protect themselves from cyber attacks. If you have any questions on your financial plan, account, or cyber security protection, please feel free to contact me at the office. I would be happy to help provide you with the peace of mind we strive to provide our clients. Have a Merry Christmas and a Happy New Year!



Your peace of mind, knowing your information is secure, is our goal.



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## A Message from Steve



2023 looks to be a great year with the EWM team providing a clear path forward.

The Econ family has been Blessed. Not only have Karen and I become parents and have seen our four daughters work their way towards college age, but we have experienced a life of making new friends over the past 25 years of being in this career. God is good. And I am thankful every day for the purpose bestowed upon me in working with so many of you for so many years. Money is an important aspect in our life. It is, by all means, not the only thing. And I write this today thinking back upon how lucky I have been to be a Financial Advisor for so long.

This note to you is not a 'farewell'. It is not even a 'goodbye'. But it is a way to convey that life will change for the Econ Family - at home and at work. In 2023, we see Katelyn and Kristen off to college.

They both have earned spots on the soccer team - at Kutztown and Wagner respectively. We all set goals in our life. Mine has been to be there as much as I could with my children - just as my Dad was there for me. So, Karen and I look forward to more time out of the office, while keeping our schedule with Ashley and Addison. With God's direction, we will be fortunate enough to continue this for a number of years.

So as my "Financial Plan" has guided us, we look to act out on our goals. With that, the year should bring, as Brian said, a chance to let the younger generation be a full force in guiding you on your financial path. With God's Grace, I will plan to be available for a number of years for your needs. But as many have noticed in the past year, I have been privileged to let a great Econ Wealth team take care of you. Please know they are wonderful. They have been a gift to our family and a gift to our clients. You know them already, I'm sure. But believe me - they are worth knowing if you have not already met them.

In conclusion, Thank You. I am grateful to you for placing your trust and friendship with EWM and with me and my family. I do look forward to seeing you all in 2023 and hopefully see you meet your financial goals and objectives in a similar manner to what God has provided for Karen and I. Happy 2023.

