



ECON WEALTH MANAGEMENT

Real. Active. Solutions.

Econ Wealth Management's Quarterly Newsletter
April 2025

Recent Events

Since the start of 2025, we have had a great turnout at the events we have hosted. We look forward to seeing you join us at one of our upcoming gatherings!

Golf Simulator

We had a great turnout at our first golf simulator event. We were able to meet some great people and enjoy playing a few holes of golf without being in the elements! Thanks to all the clients who were able to attend!



Coffee Clubs

We had two coffee clubs this quarter. For the first one we had guest speaker, Nancy Chavez, come and speak about her non-profit organization, Randi's House of Angels. She started this in honor of her daughter. Additionally, she talked about Randi's Race that is coming up on May 10th. Some of the Econ team will be in the race, and we always love if more people can participate. Contact the office for more information. The second coffee club was held at the Enders Insurance office, where an agent spoke about the market trends regarding insurance and gave helpful tips to the attendees.



Trips and Travel

Brian and Jake went to California in January to attend the PIMCO conference. Trisha and the kids tagged along and made a small trip out of it (and even met the Pittsburgh Penguins head coach!) They saw the LA Dodger's stadium being renovated and incredible views up in the hills! The Pacific Coast was the perfect backdrop for some picturesque photo opportunities!



Recently, we have been fortunate enough to celebrate the birthdays of some lovely ladies (and Brian)! We are so happy that we were able to put a smile on their faces for their special day.



Back in January, we had a surprise EWM team bonding day at Chuck E. Cheese. There were some good laughs and intense ski ball matches. Brian proved, once again, he is the best basketball player in the office.



UPCOMING EVENTS

A continuing goal for the Econ Wealth Team in 2025 is to get to know even more family and friends of our clients. We continue to offer many opportunities to do just that. When you RSVP for an event by calling the office or emailing tzellers@econwealth.com, simply tell us who you are bringing along. It's that simple! We look forward to meeting lots of new faces!

ICE CREAM SOCIAL

With the weather warming up, you know what that means... it's time for our annual Ice Cream Social! This is one of the most popular events that our clients really enjoy. Join us on the first day of summer, June 20th for a scoop (or two) of ice cream! Don't forget to invite a friend to enjoy some ice cream and get to know the Econ Wealth team. Contact Trisha at the office to let us know that you and a friend will be in attendance.



REFERRAL DINNER

We are excited to announce that we will be hosting a referral dinner for any current client that refers a new client. There will be a dinner filled with delicious food and drink at Devon Seafood. If you have anyone you would like to refer, let us know and you could receive an invitation to the next dinner!

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