

## AWM Working Remotely

We hope that you and your family have been well. We wanted to take a moment to share how Advanced Wealth Management is addressing the current health crisis and the steps we are taking to be a part of flattening the curve, while maintaining our commitment to continue to serve our clients during these times of uncertainty.

The safety of our employees, community, and clients is our primary concern. We made the decision to begin working remotely on March 18th, and have found the transition to be very successful. That being said, we deeply miss seeing our team face-to-face and are looking forward to the day we can be back in the office together.

We wanted to assure you that our firm has access to a wide range of technology and resources that allow us to stay in constant communication with each other and our clients, as well as continue to do real-time market research and analysis. Thanks to these resources and our incredible team, nothing in our process of managing and servicing your accounts has materially changed. We encourage you to call our office at (503) 452-9300 if you want to reach Bob, Ted, Traci, Linda or our operations team, as we are all still available during our regular hours and enjoy speaking with you.

We acknowledge that not every aspect of operations can remain the same while working remotely, therefore we wanted to share some small changes you may notice during this time and answer questions you may have.

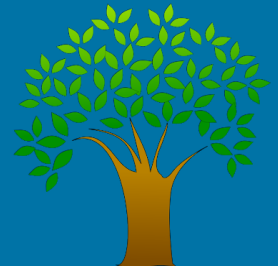
**Phones:** You may receive phone calls from our team from their personal phone numbers or from a blocked phone number. If we do reach out to you on an unfamiliar number, please know we will always leave you a voicemail identifying ourselves from Advanced Wealth Management and our reason for calling.

**Mail:** We continue to check our mailbox multiple times a week. Any correspondence, paperwork or checks mailed to our office will be received and processed as normal. Our mailing address is: 10220 SW Greenburg Rd, Suite 210, Portland, OR 97223.

**Appointments:** As much as feasibly possible, we will continue to have client appointments over the phone or by video conferencing for the time being.

We know that we these are challenging times, but we feel confident that as a firm and as a community, we can get through this together. We hope everyone can use this time at home to enjoy their families, connect virtually with loved ones far away, and take some time for yourselves.

## Environmental Impact of Using DocuSign



Our office uses DocuSign to electronically sign forms. In addition to the convenience of electronic signatures, the environmental impact of reducing paper and mail is substantial. Just among the offices connected with our partner Commonwealth Financial Network, it is estimated that we have saved over:

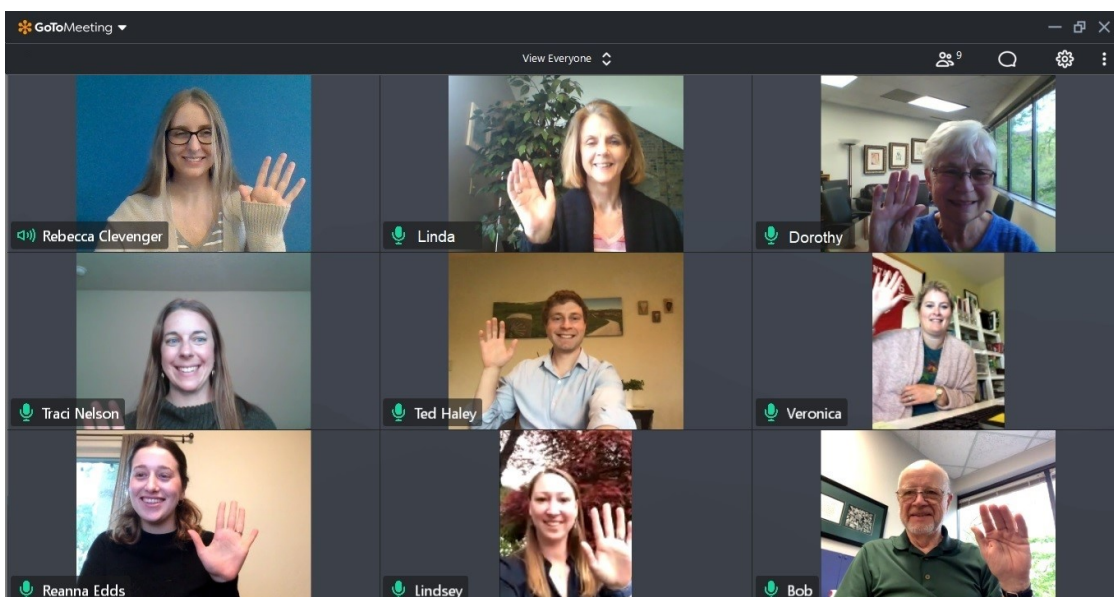
417,857 pounds of wood

1.1 million gallons of water

940,177 pounds of CO<sub>2</sub>

61,634 pounds of waste

Thank you for helping our office in making a huge environmental impact.





## Turning to the Next Chapter

Thank you for taking the time to read this, and we hope that you have found our recent client emails helpful. In many ways it feels like the world is a different place than it was when we sent out our February newsletter. The COVID-19 coronavirus pandemic has caused the global economy to essentially shut down in a way that would have seemed unimaginable a few months ago. There have been historic unemployment numbers, and historic stimulus measures aimed at softening the blow of this crisis. Markets have seen huge spikes in volatility, both on the upside and the downside. At one point US stock markets were down as much as 30% from their recent all-time highs, driven mostly by the economic impact of stay-at-home orders, but also by other events such as spectacular drops in the price of oil. Much of those losses, however, have been regained as stock markets have surged in recent weeks, defying some predictions and expectations. In fact, US stocks are roughly even with their levels from one year ago, which is amazing considering all that's happened in the last 12 months.

As always, nobody knows for sure what causes the markets to move in the ways they do, despite headlines attributing gains or losses to specific news items. At the moment, the general narrative is that stocks are rebounding so nicely because we anticipate the recession caused by the coronavirus will be brief, and that people will be enthusiastic about returning to their normal lives as soon as possible. There may be some truth to that narrative, but we feel there is significant uncertainty going forward. The virus itself will clearly not disappear anytime soon, so personal protective measures and government mandated changes are likely to be a part of our daily lives for the months ahead. There will likely be more bad news as new cases are announced and economic numbers come out, but the markets seem to be pricing in much of what we know now. However, it is possible that news will be worse than expected, and that would likely cause stock markets to fall again, as far as their recent lows or even further. That being said, we do feel that the underlying principles of our economy are sound, and we will be able to return to some sort of normalcy. There will be some companies and business models that will not survive the way that this crisis has changed our way of life. Others will thrive in our new reality. On average, we believe that our economy and markets will adapt and adjust, and we will collectively get through this. As different countries and states are starting to re-open, economic activity is starting to pick back up, and there is strong hope that we might be able to return to "normal" relatively soon. Our new normal might not be the same as our old normal, but hopefully sometime soon there will be a feeling that the worst of the crisis has passed, and that should be greatly beneficial for future economic numbers and stock market returns. And of course a return to "normal" will be life-changing for people returning to work and providing for their families, and for all of our mental health.

This crisis has impacted us all, but we have not all been impacted in the same ways. Some people have only been minorly inconvenienced, some people have struggled to work remotely, some have lost their jobs or their businesses, others lost their lives or the lives of their loved ones. While the magnitude of the impact on our lives may differ, this is a momentous historical event that we are all living through. It has been heartwarming to hear stories of communities coming together, neighbors helping neighbors, acts of appreciation for front-line workers, and people finding silver linings in their own lives such as enjoying more time with their family. We have been touched by the conversations that we have had with you all, by your concern for our team and our families, your concern for our workload (especially in the depths of the recent stock declines), and your concern for our other clients and partners. As we navigate this trying time, it has been refreshing to be reminded of the wonderful people that we work with, and how strong our Advanced Wealth Management community is. Thanks for everything!

We hope that you all stay safe, healthy, and find ways to make the best of this crisis, even if that just means getting through it. Please don't hesitate to reach out if there is anything we should be discussing at the moment, and know that we will remain here to help you navigate the ever-changing financial world.



Connect with Bob



Connect with Ted



Connect with Traci





## Finding Enjoyment During Our Time at Home

The stay at home order has us all finding new things to do at home. The team at AWM has also had to adjust to being at home a lot more than usual. We hope you are able to spend some time doing something you can enjoy at home too!

Bob and Dorothy have spent time in their garden and on Bob's favorite pastime, chopping wood!

Being forced to stay home has Veronica doing small home improvement projects that always seemed to be low on the priority list. Her family finally planted a shade garden and also installed a storm door on their front door.

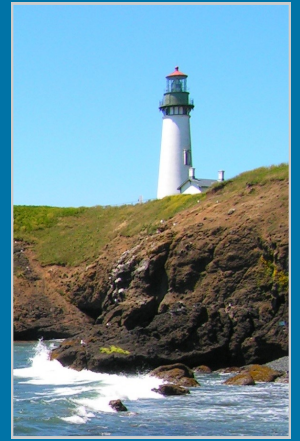
During quarantine, Reanna and her husband have been learning and perfecting their bread baking skills (and bread eating skills!), going for daily runs and tackling home projects.

Ted and Lindsey have been busy working from home with a three-year-old! Recently they made a dinosaur zip line (see the [AWM Facebook page](#) for a video), planted vegetable seeds, and have been helping Sebastian with his current favorite activity, measuring everything with a measuring tape!

Traci is really enjoying her new commute to work! She now has more time to exercise and can now enjoy her home and the flowers planted in the backyard.

Becky and her husband have been taking turns working from home and entertaining a stir-crazy toddler, whose second birthday was April 15<sup>th</sup>. Although they couldn't throw a party, they did find ways to make her day special. Of course, one uncle thought it would be hilarious to send a baby-sized drum set, and now Becky gets to spend the quarantine trapped with a budding rockstar.

Linda has been able to spend more time outside enjoying her yard and going on hikes! She misses the special hugs from her grandchildren, so finds herself doing a lot of FaceTime calling!



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### Office Closures

Memorial Day  
May 25<sup>th</sup>

Independence Day  
July 3<sup>rd</sup>

Labor Day  
September 7<sup>th</sup>

Thanksgiving  
November 26<sup>th</sup> & 27<sup>th</sup>

Christmas  
December 25<sup>th</sup>

New Years Day  
January 1<sup>st</sup>



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