THE ADVANCED CONNECTION

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Welcoming Traci Back!

Happy Fall! Thank you for all the congratulations and well wishes as my husband and I welcomed our first child this summer.

We had a baby boy, Logan, on August 31st! It has been a fun transition into parenthood and we have learned so much in just a few short weeks. Logan is smiling and "talking" which has been so much fun for us! He has already made his first trip to the Oregon Coast and started becoming best buds with our Golden Retriever, Brooks.
I am now back at AWM on a part-time basis, Monday through Friday from 8:00am to 12:00pm and will return to full-time status in January. I look forward to talking with you again soon!

Reflections on the Year by Ted Haley

As the end of the year approaches and we think of the holidays around the corner, we are taking some time to reflect on all that we have to be grateful for. Collectively we have all lived through 20 months that would have seemed impossible before March of 2020, and yet despite all the challenges we have faced, we have adapted and even found ways to thrive. As we think back and look forward, we are excited to share in this newsletter some of our personal and professional highlights.

As you know, family is very important to us here at Advanced Wealth Management, and we are thrilled that our AWM family has grown with the addition of Traci's baby boy, Logan, and Reanna's baby boy, Levi. We are all looking forward to when we can be together in the office again, to get to know Logan and Levi better in person and not just via Zoom!

As always, we are proud of our team's involvement in the community. Giving back has always been one of our core values, and that philosophy is wonderfully highlighted on page six by Linda's volunteering with the Assistance League and on page four by Veronica and her family's efforts to share their garden with their local food pantry. Building up our community and helping those less fortunate is always important, and reflecting on Veronica and Linda's efforts especially as the holidays approach is particularly powerful.

Professionally, since Covid-19, our Advanced Wealth Management team has been hard at work improving our processes and technology, as we continuously strive to provide the best possible financial management and client service. For example, data security and client privacy are always top of mind for us, and on page five you will be able to read Becky's update on our efforts there. Additionally, we have refreshed our logo, improved our website, and continue to strategize ways we can better serve our clients, so keep an eye out for continued enhancements!

As you read through the rest of our newsletter, highlighting our team and our efforts on your behalf, we encourage you to take a moment to reflect on your life over the last 20 months. Almost assuredly there have been struggles, frustrations, and challenges, but hopefully bright spots and moments of joy as well. As the year comes to a close and we celebrate the holidays (hopefully with more in-person connections this year than last), all of us here at Advanced Wealth Management are sending you our best wishes and heartfelt thanks for the opportunity to work with you. Enjoy the holidays, and we hope that 2022 brings more joy and less stress than the last two years have!

Being Grateful Garden Space by Veronica Shaffer

Sometimes success comes from an unexpected challenge and it can be so rewarding. This summer I challenged myself to plant something extra in our garden for a local food pantry, specifically tomatoes and hot peppers. I had garden space, very little experience but a lot of desire to help. I bought starter plants from the local FFA high school fundraiser and lucky for me I found a road-side stand with some very sad but free tomato starts.

I planted nine tomato plants and seven pepper plants with the intention to donate as much as I could. Over the summer my kids and I weeded, watered, and sweat a lot on those hot days. Once the plants started producing, we were delivering a small box about every 2 weeks to the pantry for distribution that night. Not everything was a success, two plants died early and I never really figured out when the right time to pick a hot pepper is. I certainly was not going to taste test! It doesn't matter though, because the big picture was perfect. My kids understand just a little more about need, volunteerism, and being so very grateful for everything we have.

Investor 360® Multi-factor Authentication: How Else Commonwealth Keeps Client Information Safe

by Becky Clevenger

October marked the 18th annual observance of National Cybersecurity Awareness Month. Originally launched by the Department of Homeland Security and the nonprofit National Cyber Security Alliance, this event was established to raise awareness about how to be safer and more secure online. But what is the real-world application of this information for Advanced Wealth Management and our clients?

For one thing, we are always adapting. Many of you may be aware of a recent example of this: your online Investor 360 account access now requires two-factor authentication to log in. This means that, in addition to providing your password, you also need to prove your identity by entering a temporary passcode that is sent to your phone or email. This adds an extra layer of security—even if someone manages to obtain your password, they still can't gain access to your Investor 360 account without quick access to that passcode.

In general, cybersecurity is something we take seriously year-round, not just in October! Commonwealth has a robust Information Security department, and our partnership with them puts their considerable resources at our disposal. They maintain and monitor our network infrastructure using state-of-the-art technology, and continually make sure our advisors and staff remain educated about potential threats.
In their own words, here are a few of the safeguards they have put in place to protect our office, and by extension our clients and partners:

Commonwealth's Shield Program provides a comprehensive security solution that includes hardware and software, such as firewalls, antimalware, system updates and patching, encryption, and secure access to Commonwealth's network and applications.

Endpoint detection capabilities and antivirus software on shielded devices provides real-time detection, response, and threat-hunting.

Email security and phishing protection through a secure email solution ensures that malicious emails do not make it to their destination and prevents sensitive information from leaving the organization without encryption.

Security awareness, training, and education through a third-party platform provides real-time threats in a safe environment and trains users on security best practices.

We are always striving to improve and keep ahead of new threats. Please let us know if you have questions, concerns, or ideas to help us improve our cybersecurity!

Making a Difference by Linda Heintz

I became involved with the Assistance League of Greater Portland several years ago when learning of the astounding number of children in our local area that call their family car their home.

The Assistance League of Greater Portland has been serving the greater Portland area since 1961 providing local community service programs that benefit children and victims of violence. The League also offers scholarships for students pursuing a trade school education. These programs are funded by operating Assistance League Thrift and Consignment Shops, through grants, special events and donations.

You can read more about the programs and services run by the Assistance League on their website: https://portland.assistanceleague.org/

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Cut down on paper mailings by going paperless and view your statements and confirmations online in Investor360®. Follow the steps below or call our office to get started:

1. Go to the setting pages in Investor360® and scroll to the Paperless Preferences section.

2. For each account, select the account holder in the "Deliver to" field and enter an email address where notifications will be sent when documents are ready to view. Check the box for all account and document types or choose the specific documents you would like to receive by paperless delivery.

3. Read and accept the Electronic Notification Agreement and then click "Save."

A Reputation to Be Proud Of

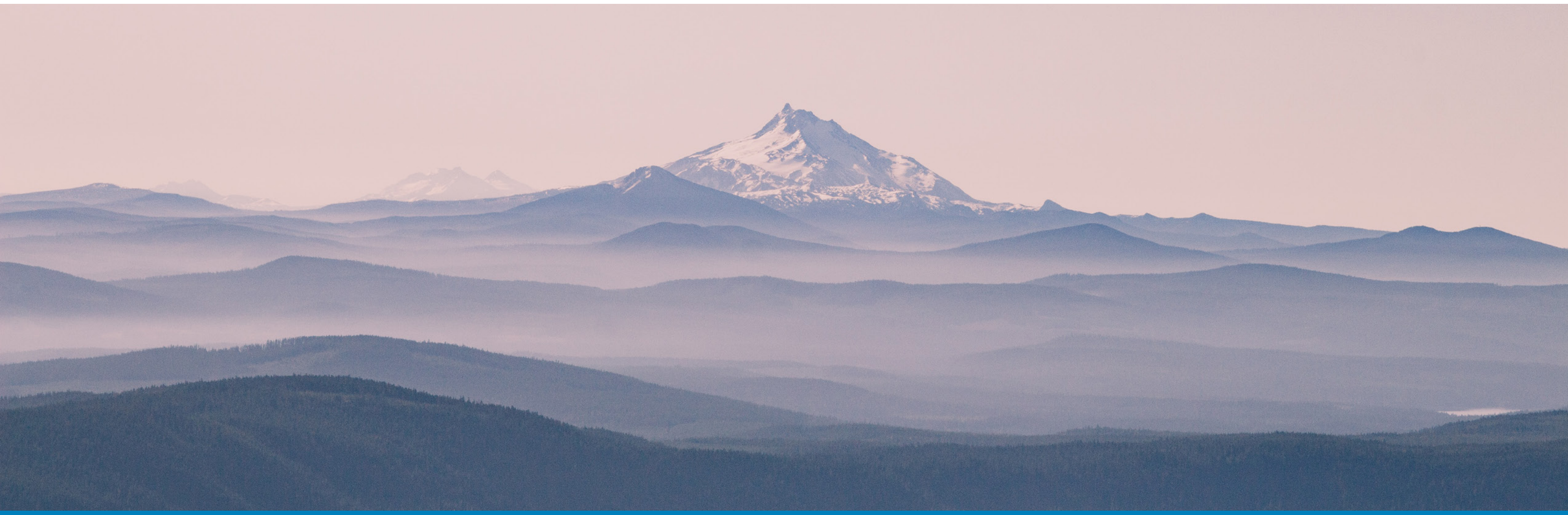
We are proud to be affiliated with Commonwealth Financial Network®, a Registered Investment Adviser–broker/dealer and partner with a singular commitment to serving independent advisors and their clients. The latest demonstration of that commitment can be found in the J.D. Power 2021 U.S. Financial Advisor Satisfaction Study. For the eighth straight time, J.D. Power ranks Commonwealth:

#1 in Independent Advisor Satisfaction Among Financial Investment Firms*

The results were no surprise to us. Commonwealth's entire organization is built around doing whatever it takes to satisfy not only the advisors who work with the firm, but the clients of those advisors as well. It's that infrastructure—and the always-expanding wealth of resources—that makes it easier for our firm to provide you with the best possible guidance and the prompt, personal service you expect and deserve.

Our firm could not be more pleased to keep such good company or to espouse these qualities in our daily dealings with our valued clients.

** Commonwealth Financial Network® received the highest score in the independent advisor segment of the J.D. Power 2010, 2012, 2013, 2014, 2018, 2019, 2020, and 2021 Financial Advisor Satisfaction Studies of customers' satisfaction among financial advisors. Visit jdpower.com/awards.*



Office Closures

Thanksgiving
November 25th - 26th

Martin Luther King Jr. Day
January 17th

Memorial Day
May 30th

Christmas (observed)
December 24th

Presidents' Day
February 21st

Juneteenth (observed)
June 20th

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