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THE PERSONAL WEALTH COACH®

An SEC Registered Investment Adviser

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Greetings from The Personal Wealth Coach®

America and our communities are facing a challenge as great or potentially greater than we have seen since the 9-11 attacks on New York and Washington. During that event and in this one, we at The Personal Wealth Coach have stood and stand ready to serve you, our clients, our friends, and your families.

The COVID-19 coronavirus has been identified in Salado and other parts of Bell County, and we must assume, is active in our community. As a precaution and in line with our responsibility to the community, effective Monday March 16, we are suspending in-office visits and we will be primarily working from our homes, but still available by phone and digitally during our normal business hours from 8:30 AM until 5:30 PM. We will still collect United States Postal Service (USPS) mail and act on your digital and phone requests as we normally do but we are discouraging personal visits and appointments.

There is no indication of any plan to close the markets, although there has been discussion of closing the live trading floor of the NYSE. Our trading, and your purchases and sales have been and are done digitally and will continue to be executed as before. Pershing, Nationwide, and our other custodians will continue to operate as normal. They too, are minimizing personal contacts and having as many as possible of their staff work remotely.

If an action on your behalf requires a signature, we will use DocuSign to communicate it to you and we will act on it as we normally do. As always, we are available to walk you through the process by phone. If you are unable to use DocuSign, we will use the U.S. Mail although we counsel you that postal service items may have been handled by multiple people and should be treated with care. We recommend you treat any envelope or box you receive as a potentially contaminated surface. Dispose of the outer envelope or box and carefully wash your hands immediately afterwards.

As we have written in our newsletter, the lifetime of this crisis is likely measured in months rather than years. Both locally and nationally, if we cooperate and support each other, we will get through this and come out stronger as it passes into memory and history. In the meantime, we at TPWC are here and ready to talk and assist you in both the difficult times and the recovery that will follow.

As always, please do not hesitate to call or email us with your questions, your thoughts, or simply to talk. We and our staff are here for you.

Sincerely yours,

Jeffrey W. McClure CFP®
M.S. Personal Financial Planning

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