
PHASES
FINANCIAL GROUP



LOOKING BACK WITH GRATITUDE

As we close out the year, we are filled with appreciation for the trust you place in us. From the many referrals you shared, to new milestones for our team, to the launch of our updated website, this has been a meaningful season of growth. In this newsletter, we share a few highlights, invite you to celebrate with us, and extend our thanks for the many ways you've helped us give back.

APPRECIATING THE MOMENTS WE'VE SHARED



THANK YOU FOR YOUR REFERRALS

This year, more clients than before have introduced us to friends, family members, and colleagues who were looking for guidance. Those introductions are one of the greatest compliments we can receive and a clear sign that you value the relationship we share.

If someone in your life could benefit from a conversation about their financial plan, we are always honored to be a resource. You are welcome to reply to this email with their contact information or simply share our website and invite them to reach out when the time feels right.



SHARE A "MOMENT THAT MATTERED" THIS YEAR

This time of year naturally invites reflection on what mattered most over the past twelve months. Beyond markets and account balances, we know that true wealth is often measured in experiences, opportunities, and the people you share them with.

We invite you to share a photo and short caption from a moment that felt especially meaningful this year. It might be buying a new home, paying off debt, a trip with family, a graduation, welcoming a new family member, or a quiet everyday scene that captures what you value most.

Reply to this email with your photo and a brief note about why it mattered to you. With your permission, we may feature a selection of these moments in an upcoming gallery on our website and in future newsletters to highlight the many ways our clients define a meaningful life.



OUR NEW WEBSITE, DESIGNED WITH YOU IN MIND

Another milestone in this next chapter for Phases Financial Group has been the launch of our new website at phasesfinancial.com. Our intention is for the site to become a central place where you can stay connected with our team, learn about upcoming events, and access articles and insights on financial planning topics. Over time, we will continue to add resources, recaps from recent gatherings, and other updates. We invite you to visit the site and check back periodically as it evolves.



CELEBRATING MICHAEL'S CHAIRMAN COUNCIL RECOGNITION

We are pleased to share that Michael was named to Raymond James' Chairman's Council for the year 2025¹. This recognition reflects sustained dedication to clients and to a high standard of professional service.

Michael has been honored with this distinction in multiple years, which you can also see highlighted on our [website](#). We are grateful for the trust you place in our team and view this recognition as a shared achievement made possible by our relationships with you.



THANK YOU FOR SUPPORTING TOYS FOR TOTS

We are deeply grateful to everyone who participated in our [Toys for Tots](#) drive this year. Seeing clients stop by the office with gifts, add them to the collection boxes, and involve their own families in the act of giving has been a highlight of our season.

Because of your generosity, more children in our local community will experience a brighter holiday. Thank you for helping us extend the spirit of gratitude into meaningful action.

CONCLUSION

At Phases Financial Group, we believe a financial plan is most meaningful when it supports the life you want to live and the people you care about. As you reflect on the past year and look ahead to the next, we are here to help you align your financial decisions with what matters most.

VISIT OUR NEW WEBSITE

REACH OUT TO US



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«EXCELLENCE IMPLIES STRIVING FOR THE HIGHEST
STANDARDS IN EVERY PHASE OF LIFE»

— John W. Gardner —

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¹Membership is based on prior fiscal year production. Requalification is required annually. The ranking may not be representative of any one client's experience, is not an endorsement, and is not indicative of an advisor's future performance. No fee is paid in exchange for this award/rating.

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