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& PARTNERS

From the Desk of Chad Teders

INDY Racing and Investing

With the Indy500 just days away, I was thinking about some of the attributes shared by successful racecar drivers and successful investors. The first thing that came to mind was risk-taking, yet never reckless. Both endeavors require the courage to take risks, but to do so based on sound judgment and experience, while avoiding dangerous behavior with wanton disregard for potential consequences.

Closely related is patience, for without it, racecar drivers and investors would be prone to taking unnecessary risk. Being patient means, understanding and executing the race plan, or the investment plan. Understanding and adhering to the process. Evaluating performance and adjusting as challenges and opportunities present themselves. The race to the checkered flag or retirement requires endurance, stamina, and perseverance. Both are long rides with no short cuts. Setbacks and surprises are inevitable.

While only one person rides in the racecar's cockpit, successful drivers and investors trust and collaborate with their teams. Whether it's comprised of engineers, mechanics, and crew members; or financial, legal, tax, and healthcare professionals, these teams are essential. They provide expertise with routine tasks for the most complex matters.

Successful racing teams and investors shepherd their resources wisely – budgeting, saving, and using their capital for good purposes. They learn from mistakes, they prioritize what matters most, and they cherish relationships.

Watching The Indy500 is a heart-pounding experience filled with a range of emotions, not unlike watching the Financial Markets. However, please remember, Chris, Amber, Jeremy and I are here for you, to help you balance emotions with reason to make better financial decisions. We're your financial pit crew – your spotters, strategists, and sounding board. It's our honor and privilege to be part of your team and we are committed to guiding you across the finish line.

We hope you enjoy the Indy500 and wish you all the best,

CHAD TEDER, CFP®

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