TouchPoint® WEALTH PARTNERS

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TouchPoints of Interest



News You Can Use

Softer Side of Finance: Books on Money and Relationships

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Associate Financial Advisor
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This article is for information purposes only and is not intended as personalized financial or tax advice. Please consult with your advisor concerning your situation.

For this article, I thought it could be helpful to take a different tone and give some focus to the relationship side of our money. The questions we hear from clients are often intermingled with family, friends, and milestone moments such as getting married, having children, or caregiving to a relative.

This is not a “Best Of” list. There are a host of excellent books that cover each of these themes, and others. View these as examples to start with. If my choice doesn’t resonate with you, perhaps a different author will.

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Don’t Let Your Home Coverage Fall Behind

Raymond Heizer Jr., CFP®
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TouchPoint® Wealth Partners

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Summer may be winding down, but the projects, purchases, and changes that came with it could have lasting effects on your homeowner’s insurance needs. The transition to fall provides a natural opportunity to review your coverage and confirm that it still aligns with your home and financial situation.

One reason to review your coverage is if you've made improvements to your home. Certain upgrades can increase the cost of repairing or rebuilding your home, which may in turn require higher coverage limits. Some examples include major renovations like additions or finishing an unfinished basement, or installing higher-end materials like new countertops, custom cabinets, or hardwood floors. Recreational features, such as a pool, hot tub, or trampoline, may also increase coverage needs by escalating liability risk.

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What We Do for Our Clients

- Review your children’s custodial accounts and 529 plans.
- Record and research your cost basis on securities.
- Reposition investments to take full advantage of tax law provisions.
- Help educate your children and grandchildren about investments and financial concepts.
- Keep you on track.

Our Service Team Can Help



Melissa Cronenweth



Diane Biehle



Sam Hutson



Joey Larson



Juliann Trester

Have you ever wondered if you need to speak with your advisor, or if someone else in our office can help?

Below are some common questions and concerns that our Service Team can assist you with!

- **I need to schedule/change an appointment.**
- **How do I log in to eMoney to view my accounts?**
- **I need to update my bank information.**
- **What is my RMD amount?**



Jenn Freeman



Amy Armstrong



Raymond Heizer, Jr.



Jason Ramage



Valerie Tate



Dawn Russell



Brenda Conley

- I need help with paperwork that was sent to me.
- How do I access my tax documents?
- I need to update my address.
- How do I use DocuSign?



Daniel Rieman

What's Happening Around the Office

Thank you to everyone who donated to our virtual food drive for Freestore Foodbank! We raised $_____, surpassing our goal! On September 23rd our team volunteered at the Freestore Foodbank Distribution Center assembling Power Packs. We look forward to volunteering every year because it is a chance to give back to our community!





We love our clients! It is our honor to be able to care for you, your family, and the people you refer. When you refer someone to your Advisor at TouchPoint®, we give them the care and dedication that you have come to appreciate.



We also love to throw parties! To celebrate, we host a referral party every January to combine these loves together. As a thank you for your referrals, we host a party for both the referrer and the person who was referred to us that became a client in the previous year. If you love your family and friends and would like to join in the "Celebration of Appreciation" hosted at Eddie Merlot's, don't keep us a secret.

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