



ANCHOR
WEALTH STRATEGIES

Cheers to Growth

Thank you to everyone who came out to celebrate with us! We're excited to see our office continue to grow and truly appreciate your support.



Left to Right
Judy Polak, Morgan
Schrum, Giovanni
Blanchette



For Her: Bloom Bar

Thank you to all the lovely ladies who stopped by the bloom bar! We loved celebrating with you.

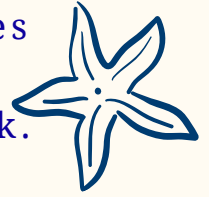


Summer Travel in Retirement: Budgeting Without Guilt

For many retirees, summer travel is one of the rewards of years of hard work and disciplined saving. But even with a solid financial plan, it's common to feel hesitant about spending money in retirement—especially on experiences rather than necessities.

Here is a checklist to help you keep your budget on track.

- Set an annual travel budget
- Plan for rising seasonal travel costs
- Use rewards points and senior discounts when available
- Review travel insurance and healthcare coverage
- Keep emergency savings separate from vacation spending



Mid-Year Financial Review: Are You Still on Track?

As the year hits its natural mid-point, June is the perfect moment to pause, celebrate progress, and focus on what matters most. Now is a good time to review your financial plan and make adjustments before year-end. Small changes made mid-year can have a meaningful impact on taxes, savings goals, retirement planning, and overall financial confidence. Make an appointment today.



[SCHEDULE ONLINE](#)

Let's Stay Anchored



**KNOW SOMEONE
WHO COULD USE A
FINANCIAL
ANCHOR?**

Referrals are the highest compliment we can receive.

If you have a friend, colleague, or family member who could benefit from personalized financial advice, we'd love to help them too!



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NEED A CHECK-IN OR HAVE QUESTIONS? I'M JUST A CALL OR CLICK AWAY!

Available for in-person or virtual meetings—just reach out!

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