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 **UnitedOne**  
Retirement & Investment  
Services

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# Financial Focus

## SPRING NEWSLETTER



### HIGHLIGHTS

April 2023

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### Happy Spring

The weather is still a combination of seasons, but that's how weather is ...*uncertain*, just like investing. Anyone with mutual funds or variable products knows that 2022 wasn't the best year for the stock market. However, first quarter statements were probably encouraging to see. Read on for an update on our move to LPL last year and an upcoming opportunity to learn more on investing in an *uncertain* market.

### LPL mailings

The transfer to LPL was pretty seamless on our part last year. However, since then we needed to manually double check information on each client. This would explain LPL mailings that may have landed in your mailboxes recently. Anything we needed to adjust or confirm, generated a confirmation letter to clients. We ask that when you get those mailings simply **confirm the accuracy of your phone number, email address, income, occupation, etc. If not correct, please give us a call** so we can get it corrected. **Heidi would be your go-to at 920-652-2570.** Thanks for your understanding and your assistance!





**Jason R. Muench, CRPC®, CFP®**  
LPL Financial Advisor

 **LPL Financial**

# Financial Focus

## NEWSLETTER



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## You're Invited

If you're looking for more information on Investing in an Uncertain Market, please **call us by April 18th to get registered** for the following event. **We do need pre-registration so as to plan food accordingly.**

### Investing in an Uncertain Market

#### PRESENTER:

David Hreha, Regional Vice President, Capital Group\*

#### DATE/LOCATION:

**Monday, April 24th, 2023 - 5:30-7PM**

Farm Wisconsin Discovery Center  
7001 Gass Lake Road, Manitowoc  
(Exit 144, corner of Hwy C and west of I43)

#### RSVP/REGISTER:

By Tuesday, April 18th

**Call Heidi Laux at 920-652-2570**

Provide names and contact information.  
Limited capacity. Light dinner buffet will be provided.

\*David Hreha and Capital Group are not affiliated with or endorsed by LPL Financial and UnitedOne Retirement & Investment Services.



**UnitedOne Retirement & Investment Services**  
**is here to help you make important financial decisions.**

For information on your accounts or to schedule an appointment with Jason or Rob, please connect with Heidi at **920-652-2570** or **invest@UnitedOne.org**

**Jason R. Muench**, CRPC®, CFP®

**Robert A. Reindl**, LPL Financial Advisor

**Heidi E. Laux**, Program Coordinator



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