

JUNE 2022



# EAGLESTRONG FINANCIAL



CELEBRATING 5 YEARS IN BUSINESS





**TRIPP YATES, CPA/PFS, CFP®**

As we reach five years since starting Eaglestrong, I am filled with immense gratitude for you, our clients, who have entrusted us with building, growing and preserving your wealth. We value our relationship with each and every one of you. For those who began with us in 2017, we have endured several ups and downs in the economy and markets. In December 2018, the U.S stock market fell 16% from December 4th through Christmas Eve due to the trade war with China. From February 20 - March 23, 2020, the market fell 34% due to the COVID outbreak and government shutdowns (the fastest bear market in history.) We are experiencing a market pullback in 2022 due to the expectation of higher interest rates to combat inflation, supply chain issues, fear of economic slowdown, and the war in Ukraine. Despite each of these difficult setbacks, the U.S. market is up 13% per year annualized over the last five years and 81% cumulative.\* This reminds us that sound investing must be coupled with patience and endurance, not unlike most successful endeavors in life.

We have and will continue to lead our work with strategic financial planning tailored to your goals and circumstances. Whether that is starting a retirement plan for your business, maximizing your current contributions, or crafting withdrawals for retirement, we continue to strive to be proactive in each situation. In the last few years, we had many consultations with some of you regarding PPP loans from the government for your businesses during the COVID shutdowns. We had numerous discussions on mortgage refinances during historical low interest rates. These are just two of many situations that come to mind that had a very positive impact on the current and future wealth for many. While our financial planning is comprehensive, it could not be accomplished without you sharing your life goals with us. In the same way, it takes communication, commitment, and partnership to execute the plan. We consider it a privilege to know you and your family well so that we can provide prudent advice.

I would be remiss to not mention how thankful we are for our faith, family, and friends. The positive influences on my life are numerous. Encouragement and mentorship are not to be understated. Since day one, I have been blessed to be a part of a study group with four other advisory firm owners across the country. We meet for an hour and a half every other week to share ideas and collaborate. My membership in the Advisor Growth Community, National Association of Personal Financial Advisors, and the XY Planning Network allow me access to communities of advisors and thought leaders to stay at the forefront of our evolving industry.

Just as we want to celebrate milestones with each of you, we are celebrating the five-year anniversary of Eaglestrong Financial. While I have been working in the industry for the last fifteen years, starting our own firm began with a vision and leap of faith. We hope that you will enjoy seeing the numbers and demographics to better understand where your advisory firm stands today. Additionally, we hope that our "More Than Numbers" section will inspire you to let us help you answer deeper questions to bring meaning to your money. Transparency and authenticity are at the heart of relationship.

Sincerely,

A handwritten signature in dark blue ink that reads "Tripp Yates". The signature is fluid and stylized, with the first and last names clearly legible.

Tripp and I are so grateful to you for putting your trust in us, especially those of you who joined us soon after the start of Eaglestrong in 2017. It was a leap of faith for us, and we are so blessed that we were able to do it together. The patience and contentment that this journey has brought us will forever shape our lives for the better.

During the eight years when I was a stay-at-home mom, I wasn't sure if I would use my CPA background again. When we launched the firm, I reactivated my CPA license and passed the Series 65 so that I could officially help as an advisor. I was glad to be able to sit for the CFP® exam this past November and officially become a CERTIFIED FINANCIAL PLANNER™ professional in December. Tripp and I have believed from the start that these credentials are the top of our industry, and the best way we can serve you with our financial knowledge and ongoing education.

Our youngest daughter was three when we started the firm, and now she is eight and about to be in third grade. We love that our girls have watched us start this firm and do what it takes to sustain it and grow it while also balancing our precious and fleeting time with them. Some of our greatest hopes for them are that they will find a career that they love and that they learn how to be good with money and not scared to invest.

This five-year milestone is such a good time for us to look back and be thankful for our business and the clients who make it possible. You can be assured that we always strive to do what is in your best interest as we continue to earn your trust as your advisors.

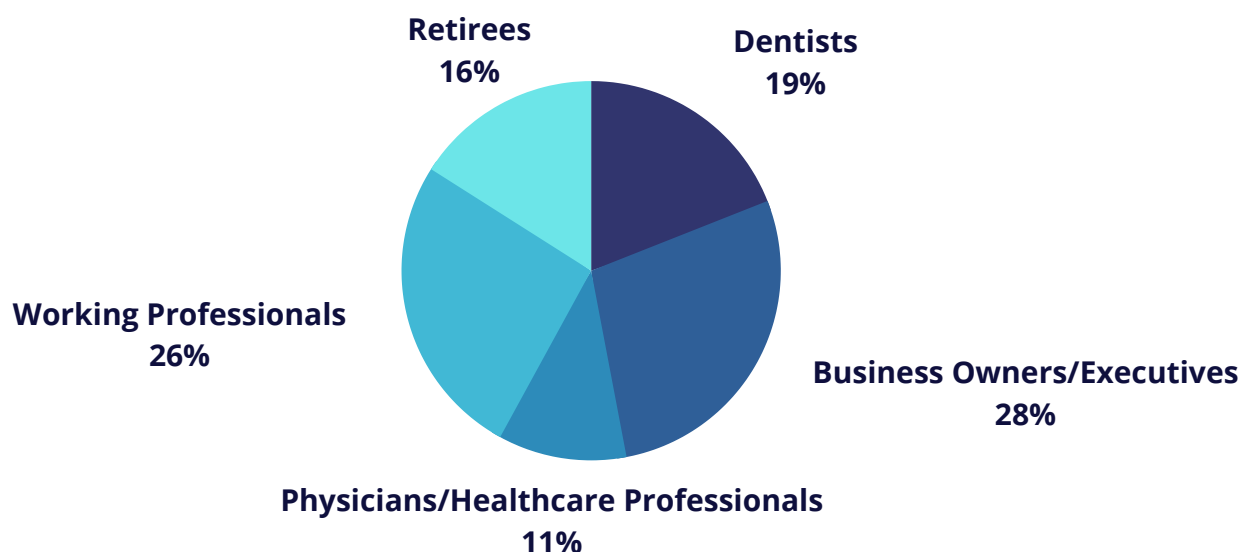
Sincerely,

*Doty Yates*

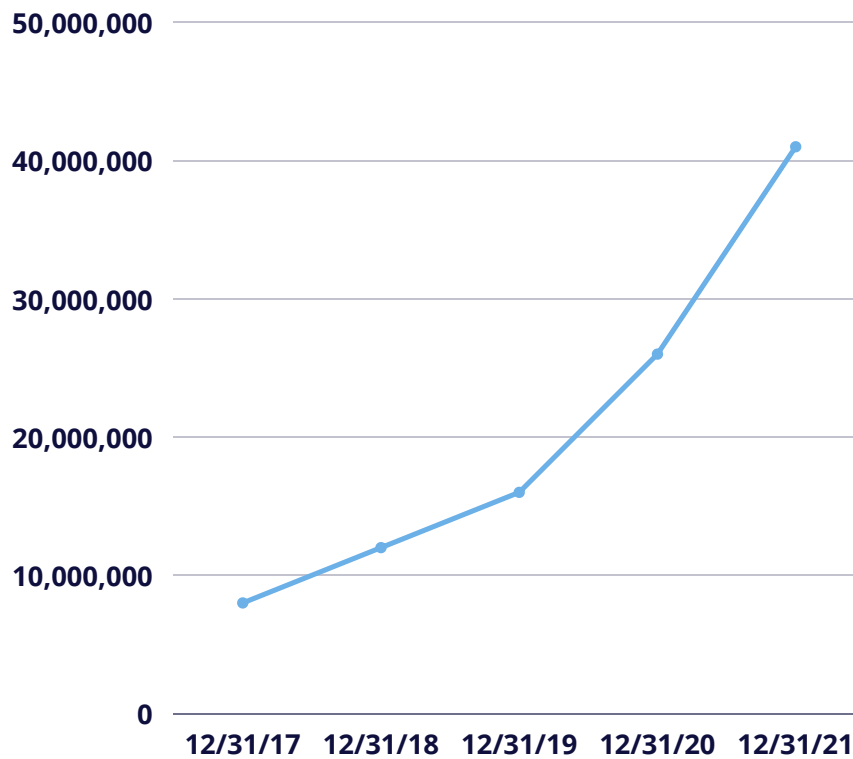


**DOTY YATES, CPA, CFP®**

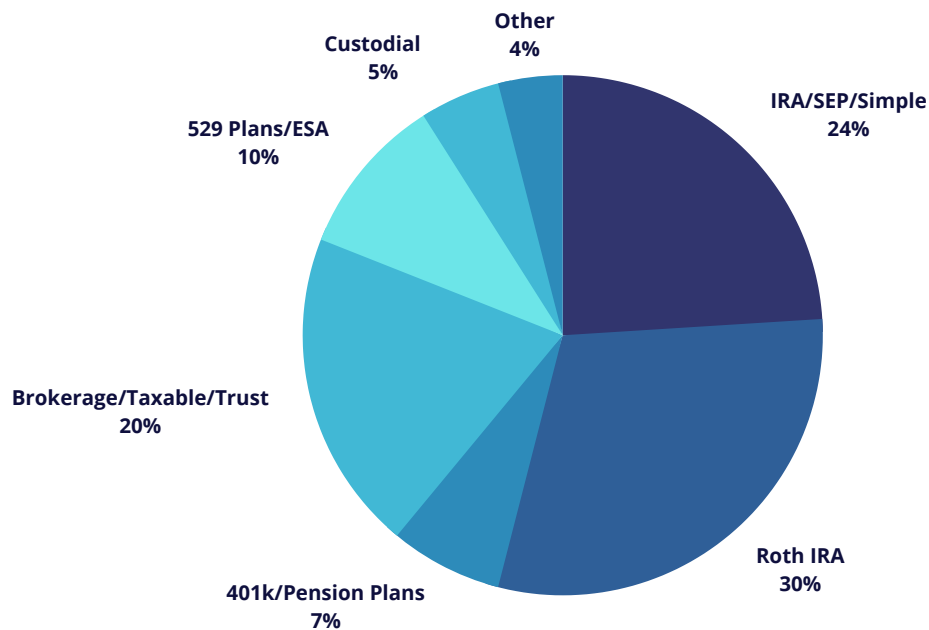
## WHO WE WORK WITH



## ASSETS UNDER MANAGEMENT

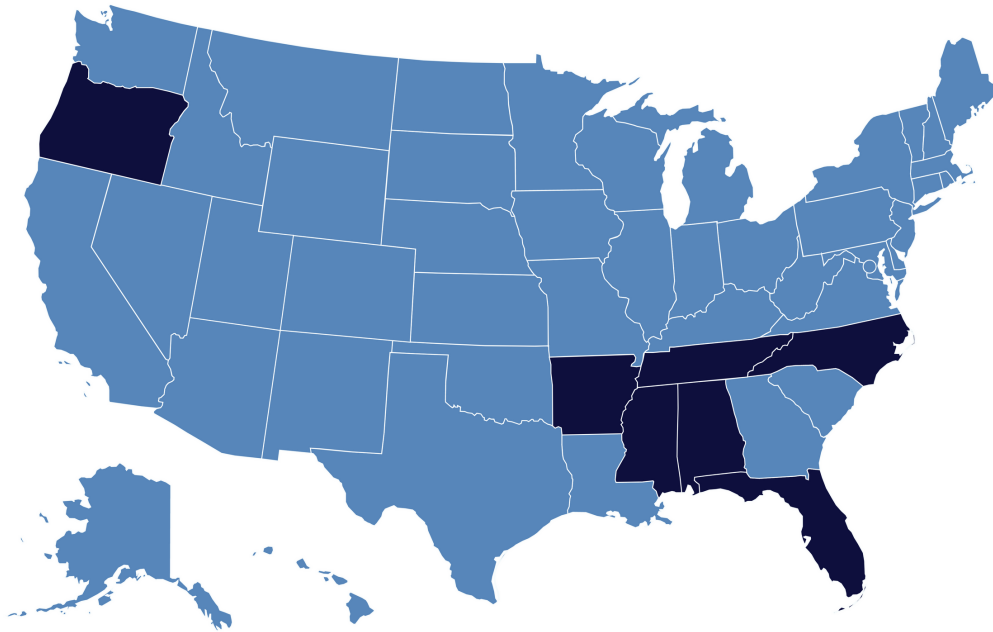


## TYPES OF ACCOUNTS





## WORKING WITH CLIENTS ACROSS THE COUNTRY



**7 States - 73 Households**

While we continue to value in-person meetings, many clients choose to meet virtually in today's environment. The convenience and accessibility of virtual meetings have allowed us to work with clients across the country.

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## MORE THAN NUMBERS

Focusing on your goals and what matters to you helps bring meaning to your money. Answering three questions can help clarify what you value most and the things you dream of doing. Writing down those goals that are important to you allows you to start using your money to do and experience what gives you the most satisfaction. It may be expensive such as a vacation you have been wanting to take, or it may be as simple as spending quality time with your family or friends that costs nothing. We hope these three questions and giving examples of some of our answers will inspire you.

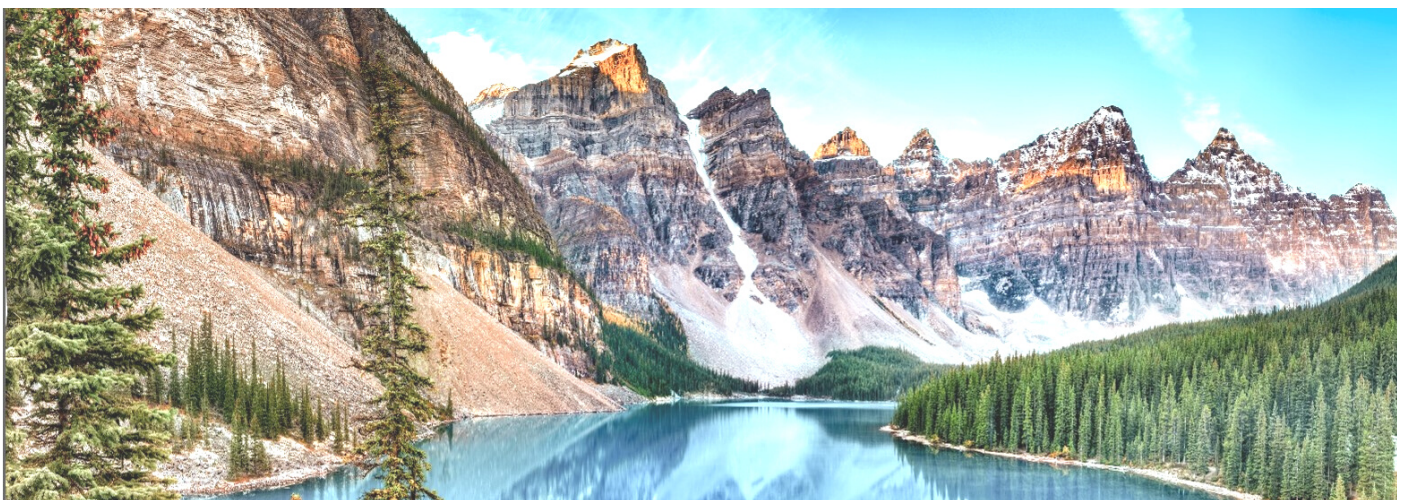
\* Based on George Kinder's Life Planning.



### DREAM BIG

**What would you do if you had unlimited money and resources?**

These are the items that seem off in the distance. Whether they require money, time away, or both, it brings joy to you to think about. We often talk about the places we want to travel with and without our girls. We have a map on our wall with pushpins where we keep up with the places we have been and where we want to go. Writing these items down lets you actually accomplish some of them over time making a dream become a reality.





## 2

### BUCKET LIST

**What if you only had 5-10 years to live?  
(without unlimited resources)**



We believe that if we knew we had a decade or less to live that we would want to spend quality time with those we are closet to – family and friends. Additionally, there would be items listed on the first question (Dream Big) that we would feel a sense of urgency to do. Tripp grew up playing tennis competitively and has always wanted to go to Wimbledon. Bucket list items are similar to your dreams but your time to accomplish them is limited. This makes these items even more valuable to you.

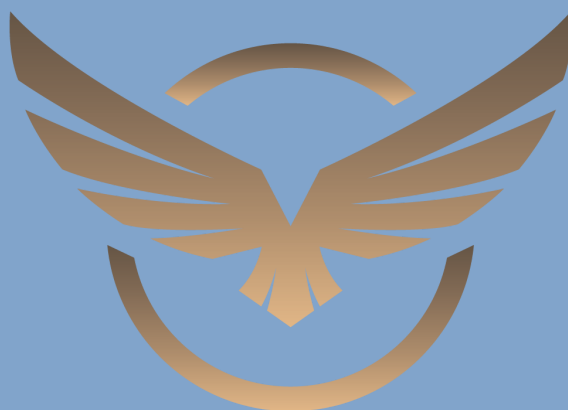
## 3

### PRIORITIES

**What if you only had 24 hours to live?**

Our focus would be on our faith, family and friends. Relationships become the most valuable in this instance. Knowing what we would value most in this situation helps us to be more intentional in our daily lives spending time with those we cherish most. It allows us to be proactive in planning dreams or bucket list items with our family and friends. Experiences will trump material items because they create lasting memories that build relationships.





# EAGLESTRONG

— F I N A N C I A L —

Q U I E T   S T R E N G T H   -   C L E A R   V I S I O N

**\*Past performance does not guarantee future results. Returns (annualized and cumulative) obtained from Kwanti Portfolio Analytics. The returns mentioned are the S&P 500 Total Return Index. This index is widely regarded as the best single gauge of large-cap U.S. equities. It includes 500 leading companies and covers approximately 80% of available market capitalization. Return dates used: 12/4/18 through 12/24/18, 2/20/20 through 3/23/20, and 6/1/17 through 5/10/22.**

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