



THE DISTELFINK

July 29, 2009

It feels like we are at an inflection point in the summer. Second quarter end has come and gone, and so too has the reporting about it. Earnings season continues to drive good and bad days in the stock market. Interest rates are behaving like a yoyo bobbing up and down. And trying to schedule meetings and lunches around one person or another's vacation plans is becoming almost impossible. So it seems like an ideal time to get creative, and I have.

If you haven't visited the Weightman Wealth Advisory website recently, please have a look. I've modified the Resources page to include a helpful links section which lists a handful of organizational and educational websites that I think you may find of interest. I've posted a Founder's Letter link following my Bio, as well. I've also given the Distelfink its own tab where I store the most current essay, in addition to the March communications that initially described the practice, and the subsequent pieces sent out. They're not big changes, but hopefully serve as useful enhancements.

I'll reveal another big project later in August and I'm very excited about it. I will be soliciting a lot of feedback, which I hope to receive as email responses, phone calls and during the course of in person meetings, so please stay tuned. I also plan to take on a rather larger topic in September, as kids all over are at last back in school. I want to focus on preparing children for financial and philanthropic responsibilities, and I plan to tackle this subject over a series of essays. Generally, I enjoy the challenge of keeping my communications brief – so I don't become overwhelmed writing them, and with the hope you will take a moment to read them. Educating our children is so fundamental though, that I know I'm going to need more than 500 words, my usual target, to do this subject justice, so I will break it into installments.

I hope you have come to trust that when you open an email from the Distelfink it won't bog you down as some lengthy tome. But instead, it will share observations about people or things that I believe work in the financial industry, or don't. Or it will be written about life experiences that remind us of ourselves, or someone close to us. The practice of wealth management should not be some scary, sterile numbers based process that intimidates people. It should be vibrant and collaborative and empowering like the individuals involved in it. Or at least that's my belief.

Lastly, I want you to know how much pleasure I experience developing these pieces, and having the opportunity to share them. Many comments and responses have been so thoughtful, and they definitely inspire me to keep writing. However, if there are those who would prefer to opt out, I am happy to take you off my distribution list. Please simply respond to this email. Alternatively, if you know of others who might be interested in being added to the list, kindly give me their names and email addresses, or have them contact me directly, and I would be thrilled to add them. Truly special thanks go to those who have already given me names, and especially those

who have considered me for prospective client opportunities. You are helping this business to grow and I can't thank you enough for your trust and confidence.

I hope you are enjoying this beautiful summer, and as always, wishing you all the best,

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