

MOMENTUM NEWSLETTER

Live More, Worry Less.



August 2021

Feature Stories

TOM KENNEDY NAMED BOARD MEMBER WITH UNITED AGAINST HUMAN TRAFFICKING



Global Wealth Advisors Managing Partner Tom Kennedy, CFP® has been elected vice chair to the United Against Human Trafficking (UAHT) board of directors. As a board member, he will assist with business planning and fundraising, as well as providing trafficked survivors with the financial skills necessary to reduce risk of revictimization.

Tom's activities with UAHT will extend beyond philanthropy, to include hands-on volunteering efforts and survivor education on financially related strategies. If you would like to donate, please [visit UAHT's donation page](#).

BITCOIN BULL OR BEAR - HERE'S WHAT YOU SHOULD KNOW



We've all seen the stories about bitcoin over the past few years—the triumphs and the pitfalls. If you're one of the many who are curious about bitcoin, read on for some of what you should know about the emerging world of cryptocurrency.

[read more >>](#)

From the Blog

THE POWER OF SOCIAL SECURITY TIMING



When it comes to how much social security you will receive, you may be surprised to learn that you have a choice in the matter—and timing is everything.

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TRANSITIONING INTO YOUR RETIREMENT



As people retire healthier and better educated than ever before, the traditional picture of retirement is changing. These questions may help.

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Monthly Tasks



YOUR MONTHLY FINANCIAL TASKS FOR AUGUST

By end of summer, August should find you catching up on financial housekeeping. Follow this guideline to stay on track with your monthly financial tasks.

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Business Corner



GUIDING YOUR BUSINESS WITH CONTINUITY PLANNING

A continuity plan protects short-term and long-term business interests and is one of the most important components to business exit planning.

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Getting Social



HOW TO GET A JOINT MORTGAGE WITH FAMILY OR FRIENDS

It's no longer uncommon to find family and friends entering into a joint mortgage. Learn about the pros and cons.

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Latest Podcast



MIDYEAR MARKET RECAP WITH KRIS & TOM

Kris and Tom discuss inflation, interest rates, oil, technology and stay-at-home stocks, and cryptocurrency.

[listen in >>](#)

Volunteer Opportunity

GWA TO HOLD THIRD ANNUAL VOLUNTEER EVENT IN DALLAS



The Lewisville office will hold their annual Nickel from Nicole volunteer event on Saturday, August 14th from 10:00-1:00 P.M. If you are in the Dallas area, and you wish to volunteer, [please visit our signup page](#).

Nickel from Nicole is a 501(c)3 non-profit whose mission is to promote safe driving awareness to new teenage drivers, and their parents. Nicole's tragic death is a wake up call, and reminder of the fatal consequences that can result from reckless behavior behind the wheel. We will assemble "nickel cards" which are sent to safe driving programs around the country. If you are unable to attend and would like to help, [please visit their donation page](#).

Final Thoughts

Remember that the happiest people are not those getting more, but those giving more. - H. Jackson Brown, Jr.



We are excited to share our social responsibility activities with you this month, especially because so many events were put on hold last year due to the pandemic.

As part of the GWA Gives© mission, we seek to give back to the communities in which we operate. If you have a small non-profit that is near and dear to you, please let us know, and our social responsibility committee will take a look at how we can help out.