



The Jester Group Newsletter

Fourth Quarter 2019

Invest in good.



Resources and Readings

- Wealth Strategies Call: [End of Year Tax Planning with Brian Ellenbecker, CFP, CPWA, CIMA -- Senior Financial Planner at Baird](#)
- Financial Planning: [Have You Planned for All 3 Phases of Retirement?](#)
- Budgeting: [Teaching Kids to be Financially Fit](#)
- The Markets and Investing: [Q3 2019 Review and Outlook](#)
- On Impact Investing: [Green Century Is Protecting Tropical Forests](#)
- Next Gen: [Baird Digest: Aligning Your Money With Your Values](#)
- John Taft's Blog: *Finance for the Greater Good: [Answering the Important Questions](#)*
- Bull and Baird Blog: [Maximum Frustration](#)

Jester Group News and Insights

- Featured Sponsorships: [Carolina Tiger Rescue](#) & [Illuminated Dresses](#)
- What We Do For You: [A comprehensive list of the wealth management services that we provide our clients](#)
- Impact Investing Journal: [Entry 3: Shareholder Advocacy](#)

Upcoming Dates

Date	Event
11/28/2019	Markets Closed for Thanksgiving
12/04	Jester Group Holiday Party
12/21	Star Wars Screening at SilverSpot in Chapel Hill, NC
12/25	Markets Closed for Christmas Day
01/01/2020	Markets Closed for New Year's Day

C. Gene Jester
CFP®, CPWA®, CRPS®
Director

Bert "Cort" L. Bennett IV
CFP®
Financial Advisor

David Jester
Financial Advisor

Tracie Legg
Senior Client
Specialist

Emma Jackson
Senior Client
Specialist

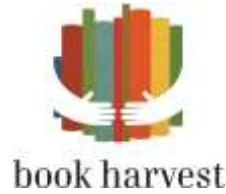


The Jester Group
Private Wealth Management
1414 Raleigh Road, Suite 420
Chapel Hill, NC 27517
919-918-2900
[Visit our website](#)

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We choose to devote our sponsorship efforts towards organizations that we believe are aligned with The Jester Group's and Baird's philosophy of being active and engaged participants in our community.

We Proudly Sponsor the Following Local Organizations:



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