



The Jester Group Newsletter

Fourth Quarter 2020



Resources and Readings

- The Markets and Investing: [Market Strategy Weekly from Strategas](#)

Strategas – a Baird Company provides Market Strategy and timely perspective to help you better understand what’s happening in the world today and what it means for your portfolio and plans. These premier insights combine investment strategy, macroeconomic perspective, government policy research, technical analysis and a deep understanding of the fixed income and equity markets. This comprehensive Market Strategy complements and enhances our investment and planning solutions for you.

- The Buzz: [Tax Implications of a Biden Administration](#)

With two very different candidates running – and control of Congress at stake as well – the 2020 presidential election could have significant implications on many aspects of our lives. One of the biggest differences between the two parties is in tax policy, where Democratic candidate Joe Biden has proposed repealing many of the aspects of the 2017 Tax Cuts and Jobs Act (TCJA), while President Donald Trump would prefer to make many of its temporary provisions permanent.

- Insurance Planning: [Key Moves for Open Enrollment Season](#)

Every year, the descent of autumn brings us leaves changing color, pumpkin spice invading the grocery shelves, and open enrollment offered by your HR department. While many employees just check the same boxes on the enrollment form each year, there are a few areas worth spending a little time on, especially at a point when COVID-19 has disrupted so many of our lives.

- On Sustainable and Responsible Investing (SRI): [ESG Investing During the COVID Pandemic](#)

Baird’s Mike Antonelli and John Taft take a look at how ESG (Environmental, Social, and Governance) investments have fared in the face of extreme market volatility.

- Education: [Teaching Kids to be Financially Fit](#)

For any parent, one of the most valuable lessons you can teach your children is how to be smart with money. It’s a process that continues throughout their lives, so no matter how old your kids are, there are lessons to be imparted.

- Next Generation: [Investing in an Election Year](#)

The perils of letting the upcoming election influence your portfolio strategy.

Jester Group News and Insights

- Our Operations Plan for Enduring [COVID-19](#)
- Find us on [Facebook](#) for timely updates.

Upcoming Dates

Date	Event
November 4	Team Retreat
November 26	Thanksgiving Day – Office Closed
December 25	Christmas Day – Office Closed

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

Bert “Cort” L. Bennett IV
CFP®, CSRIC™
Financial Advisor

David Jester,
CSRIC™
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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