

July 2024

Helping to take
the confusion
out of retirement!



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4th of July Celebrations

Unfortunately this year Milwaukee will not be having their lakefront firework celebration. There are many other cities around the area back to celebrating the holiday. Almost all of the suburbs including Wauwatosa, Germantown, Oak Creek, Franklin, Cedarburg, and Brookfield will have their parades and fireworks on July 4th with some having festivals going throughout the whole weekend. Most of the Milwaukee County parks will also have their fireworks on the 4th. Please look at the [link](#) if you are interested in finding when and where 4th of July celebrations will be happening around you.

If you already have plans for the 4th, whether that is celebrating with family and friends locally, traveling up north, or out of the state, please have a fun and safe 4th of July weekend.

AUGUST EVENTS TO CHECK OUT

The [Brewers](#) scheduled to play 13 home games

8/1-11- State Fair- [State Fair Park](#)

8/2- Barry Manilow- [Fiserv Forum](#)

8/7- Blink 182- [Fiserv Forum](#)

8/15- Heart & Cheap Trick- [Fiserv Forum](#)

8/14- Milwaukee Night Market - [Wisconsin Avenue](#)

8/15-18- Irish Fest-- [Henry Maier Festival Park](#)

8/15-18- Milwaukee a la carte at the Zoo- [Milwaukee County Zoo](#)

8/23-25- Mexican Fiesta- [Henry Maier Festival Park](#)

8/23-24- Country in the Burg- [Cedar Creek Park](#)

8/31- Third Ward Art Festival- [Third Ward](#)

Special Reminders:

Do you need a referral for anything? Call us, we would love to help!

If you have any changes to your personal information, please call Zach at 262-408-5820 and he will be happy to assist you!

Would you like to schedule a progress appointment with Jay? Call Zach at 262-408-5820 to set up an appointment.



**Wishing all our
July clients a
splendid**

birthday.

**Cheers to another
great year!**

The celebs celebrating ...

7/3 Tom Cruise turns 62

7/9 Tom Hanks turns 68

7/13 Harrison Ford turns 82

7/16 Will Ferrell turns 57

7/18 Kristen Bell turns 44

7/23 Woody Harrelson turns 63

7/24 Jennifer Lopez turns 55

7/28 Sandra Bullock turns 60

Raspberry Oatmeal Cookie Bars

- 1 cup all-purpose flour
- 1 cup rolled oats
- ½ cup packed light brown sugar
- ¼ teaspoon baking soda
- ⅛ teaspoon salt
- ½ cup butter, softened
- ¾ cup seedless raspberry jam



A Message From Jay

Welcome to July!

The 1st part of the month looks to be very pleasant, weather wise. I had a couple of work related trips in June and tied in some fun as well. In earlier June, I attended my 26th consecutive Million Dollar Roundtable convention. MDRT is the premier association of financial professionals and is recognized internationally as the standard of excellence in the life insurance and financial services business. This year, the convention was held in Vancouver, BC, which is one of my favorite cities. I attend this event every year to learn how I can better serve my clients and gain knowledge on products and services and changes in our industry.

Later in June, I was in Omaha, NE. I was able to attend 3 men's College World Series games. The CWS has been held in Omaha since 1950 and host the top 8 teams in a double elimination format. When my sons were younger, the 3 of us attended the CWS for 12 consecutive years. We have so many great memories of our father/sons annual trips! While in Omaha, I also participated in Mutual of Omaha Field Advisory Council meetings. I have been on the FAC for many years, and we meet with our home office partners to discuss various topics, such as new products and services that we can help our clients with. We are also the voice of our fellow advisors from around the country. The conversations were productive as we continue to set the direction of our future together.

Please enjoy this 1st full month of summer and have a happy and safe 4th of July!

Be well,
Jay

Directions

1. Gather all ingredients. Preheat the oven to 350 degrees F (175 degrees C). Grease an 8x8-inch square pan; line with greased foil.
2. Combine flour, oats, brown sugar, baking soda, and salt in a large bowl. Rub in butter using your hands or a pastry blender to form a crumbly mixture.
3. Press 2 cups oat mixture into the bottom of the prepared pan.
4. Spread jam to within 1/4 inch of the edge.
5. Sprinkle remaining crumb mixture on top; press down lightly into jam.
6. Bake in the preheated oven until lightly browned, 35 to 40 minutes.
7. Allow to cool before cutting into bars.



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