

Nicole Ferrell

From: Parkhurst Financial Services, Inc. <info@parkhurstfinancial.com>
Sent: Tuesday, October 16, 2018 2:22 PM
To: nicole@parkhurstfinancial.com
Subject: [Test] October Newsletter

[View this email in your browser](#)



Client Event Wrap Up:

We would like to thank the over 100 clients who either attended or listened live to our October 9th client event at Lockkeepers. We also want to thank SEI Private Trust Company, AssetMark, JP Morgan, Franklin Templeton and Russell Investments for sponsoring the event.

To recap some of the main themes discussed by our three speakers and panelists:

1. We are in the latter stages of a long run up in the equity markets, particularly U.S. equities. While continued growth is expected based upon positive economic fundamentals, so is increased market volatility.
2. U.S. equities have outperformed International and Emerging markets in 2018 due to a rising U.S. dollar and concerns about tariffs and trade wars.
3. Bond yields have risen as the Federal Reserve continues to slowly raise interest rates, which has put downward pressure on bond prices. Diversification of bonds is advisable in this type of environment.
4. Tax management is very important. Investors can lose a lot of potential long-term growth to capital gains taxes if non-qualified portfolios aren't managed in a tax efficient manner.

[HERE](#) you will find the PowerPoint Presentation used by the speakers.

If you were unable to attend or listen live, we had the 2018 event recorded and you can listen to it by clicking [HERE](#).

The recording password is: 5yQ9sd2d

Asset Allocation/2018 Portfolio Performance:

Below is a great third quarter market update from Jerry Chafkin, CIO of AssetMark. He does a very good job of breaking down the current

market environment and discussing the importance of asset allocation and diversification, two core investment beliefs of our firm. While this strategy has been successful over the long term, it has been challenged some this year as investors may try and compare their diversified balanced portfolio to that of the US equity market. Jerry talks about two behavioral finance terms- “availability bias” and “anchoring” that are common and we see regularly in our discussions and meetings with clients.

Please spend some time reviewing Jerry’s article [HERE](#)

Office Update:

Please note that our office will be closed Thursday, November 22nd and Friday, November 23rd, in observance of Thanksgiving.

Best Regards,
The Parkhurst Team



Copyright © 2018 Parkhurst Financial Services, Inc., All rights reserved.

You are receiving this email because you are clients or prospects of Parkhurst Financial Services, Inc.

Investors should be aware that there are risks inherent in all investments, such as fluctuations in investment principal. With any investment vehicle, past performance is not a guarantee of future results.

Indexes mentioned are unmanaged and cannot be invested in directly. Registered Representatives, Securities offered through Cambridge Investment Research, Inc., a Broker/Dealer, Member FINRA/SIPC. Investment Advisor Representatives, Cambridge Investment Research Advisors, Inc., a Registered

Investment Adviser. Cambridge and Parkhurst Financial Services are not affiliated.

Our mailing address is:

Parkhurst Financial Services, Inc.
10950 Pearl Rd, Suite A-6
Strongsville, OH 44136

[Add us to your address book](#)

Want to change how you receive these emails?

You can [update your preferences](#) or [unsubscribe from this list](#).

