

summaries



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LIFE LESSONS FROM THE LITTLE LEAGUE DUGOUT

Between being the dugout mom for my son's Lake Mary Little League team and watching my husband assistant coach both of our kids' teams, I've spent a lot of weekends at the ballfields lately. The dirt, snacks, celebrations and pep talks make it such a great place. Time seems to stand still when we're watching our kids play. There is no better place than a little league field to learn that patience is a virtue, and snacks are essential.

Our family has been part of Lake Mary Little League for the last three years, and it's become so much more than a sports league. It's a community that feels like family. The kind that cheers just as loudly for your kid as they do their own. The kind that celebrates every player's improvement, not just the final score. And yes, it's also the proud home of the 2024 Little League World Series Champions!

The 2025 spring regular season just concluded here in Florida. I spent my Saturday mornings in the dugout helping keep my son's team organized, while my husband pulled double-duty assistant coaching both of our kids.

Somewhere between balancing the schedules, packing snacks and organizing the kid's walkup music, I realized the ballfield is full of financial wisdom. Given the current market volatility and the abundance of distracting headlines, these lessons are particularly relevant now.

1. You Can't Skip the Fundamentals

Baseball isn't intuitive, there is a lot for kids to learn. Whether it's how to run the bases or how to properly swing a bat, every player starts with the basics. Financially, the fundamentals are just as important: saving regularly, investing intentionally, and building a plan that fits your goals. These aren't flashy or exciting but they're what lead to success over time. Investors who stick to their plan, stay diversified, and resist the urge to "swing for the fences" tend to come out ahead.

2. The Game Isn't Won in One Inning

My daughter's softball team didn't win a single game last season. This season they had a rough start but ended the season beating an undefeated team to win their championship! That kind of turnaround doesn't happen overnight. It takes showing up, staying focused, and trusting the process, and so does investing. Markets have losing streaks, but long-term commitment pays off. Recent volatility reminds us that even great portfolios can have bad innings. The key is to stay in the game.

3. Coaching Matters More Than Reacting

In the dugout helping a group of five- to eight-year-old boys, I saw a lot of emotions from frustration to full-on dance breaks. What kids need in those big moments is guidance. It's the same with investing. When the market

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throws a curveball, the best move isn't to panic. It's to lean on a plan and a coach you trust. Often the best strategy is a steady hand and a long-term view.

4. Every Player (and Investment) Has a Role

Not every kid is the star hitter. A good team needs players with different skills that complement each other. Some bring quiet consistency, while others keep spirits high in the dugout. A good portfolio works the same way. Growth stocks, bonds, dividend payers, alternatives each serve a purpose. You win with balance and diversification. That's especially true in today's environment, where different parts of the portfolio may rise and fall at different times. That's not failure, it's design.

5. Progress Isn't Always Measured in Home Runs

My kids didn't hit any grand slams this year, they didn't even hit any home runs. But they learned to stay focused, cheer for their teammates, listen to their coaches and keep going after a strikeout. Financial wins are the same: paying off debt, increasing your savings, teaching your kids about money, these are all victories worth celebrating. Right now, staying invested, staying disciplined, and sticking to your goals is a win even if the scoreboard doesn't reflect it yet.

6. Great Teams Communicate

Whether it's calling a pop-up, knowing the count, or checking in on goals, communication keeps everyone aligned. That's why we value regular conversations with clients so we can adjust, refocus, and make sure the plan still works for you. If recent volatility has you feeling uncertain, give us a call. Sometimes a check in is all it takes to feel grounded again.

As we head into this summer, I'm cheering just as hard for your financial wins as I did for those game-saving plays. Whether you're on a hot streak or facing a tough inning, remember progress takes time, great teams communicate, and even the underdogs can end up champions. I've learned that the best results in sports and in life come from showing up, encouragement, patience and trust.

Please reach out anytime and let's make sure your finances are ready for the next season of life. And try and catch a ball game this summer, whether it's a local Little League or the pros the ball field is always a great place to spend a few hours.

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