

SCROGGINS WEALTH TEAM
SOUTHWESTERN
INVESTMENT GROUP



Scroggins Team Fall Newsletter

Dear Clients and Friends:

'tis the season for pumpkin spice and everything nice! It's been an extra warm fall, but things are finally starting to cool down while holiday preparations ramp up. We know how busy this season can get, and want to remind you that most 2019 deductions and year-end tax strategies must take place *before* the end of the year – more about that below. As the new year approaches and you get together with family, don't hesitate to call us with any questions you might have about decisions you have to make for 2020, like Medicare, Long Term Care, retirement options, etc. We also have several exciting updates of our own this season to share with you.

Now, enjoy these updates and tips from your Scroggins Wealth Team:

That New Office Smell

How Do We Look in Lime?





October 21st we will be at our new location in Homewood! Our new office is off Lakeshore across from Samford. 600 University Park Place, Suite 350, Homewood, AL 35209.

Along with our new office space, we also are implementing new email addresses and a new corporate website. You can now reach any of our team members at the address designation of @SWInvestmentGroup.com. Our Raymond James email addresses are still active, so it's no problem if you continue to send messages to those addresses. We will receive the message, but our responses will come from the new email addresses. We recommend that you save these new addresses in your address book to prevent any chance of the messages going to spam. See the new website at <https://www.swinvestmentgroup.com/>

Both Jesse and Will are enjoying the limelight as they are honored by Forbes and Raymond James. You may have seen Jesse in the Birmingham Business Journal as he was listed on the Forbes' [Next-Gen Best-In-State Wealth Advisors list](#). Each adviser, selected by SHOOK Research, was chosen based on an algorithm of qualitative and quantitative criteria, including in-person interviews, industry experience, compliance records, revenue produced and assets under management.

Both Will and Jesse were honored by Raymond James. They were both listed on the Executive Council*, the third and largest recognition level tier, made up of financial advisors and branch managers with personal and branch revenue exceeding annual predetermined thresholds.

Congratulations!

*Membership is based on prior fiscal year production. Re-qualification is required annually. The ranking may not be representative of any one client's experience, is not an endorsement, and is not indicative of advisors future performance. No fee is paid in exchange for this award/rating.



An Anniversary and a Special Coffee Surprise



Jesse celebrated six years of marriage to his wife Hannah. The top left picture is from their wedding. They celebrated with a couple's bicycle ride. Each morning Jesse and Hannah drink their morning coffee together. As a surprise, Hannah created a special mug for Jesse with a secret message on the bottom of the cup. As they sat on the couch, she waited patiently & eagerly for him to finish the coffee so he could see what it said... "Jesse, we're having A BABY!" Fair to say it was the best cup of coffee he's ever had. Baby Scroggins' due date is April 5th.

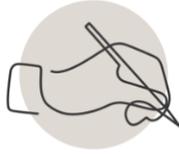
First Comes Love... Then Comes Marriage...

Then Comes...



We introduced Will's wife, Mrs. Caroline Scroggins, in our summer newsletter. Now you can take a look at all their BEAUTIFUL [wedding photos here](#). We promise you won't be disappointed. This fall the happy couple spent a day with friends at Keeneland. Also, on the horizon for the new couple... a little girl!! That's right **both** Scroggins brothers are welcoming new babies!





Take stock of what matters

Live today, and prepare for tomorrow. Review what considerations and conversations might be helpful to your legacy planning, and what documents you should have in place.

[View the checklist](#)

MEDICARE LUNCH & LEARN

Are you aware of the changes in Medicare for 2020? Join us for lunch at our **NEW OFFICE** Oct. 30th at 11 AM

**600 University Park Place
Suite 350
Homewood, AL 35209
(NEW LOCATION)**

HOSTED BY BUZZ STONE, MEDICARE SPECIALIST & SCROGGINS WEALTH TEAM
RSVP TO JESSICA LANDRY
(205)-981-1099 OR jessica.landry@swinvestmentgroup.com



Your Year-End Tax Planning Checklist

Kickstart your tax season planning with this list of important deadlines, relevant documents and strategy considerations.



[Click here to schedule a meeting with us!](#)

Don't forget to forward this newsletter to any friends or family who would enjoy it!

Scroggins Wealth Team, Southwestern Investment Group

600 University Park Place, Suite 350, Homewood, AL 35209
205-981-1099

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delete the material from your computer. Neither Raymond James Financial Services nor any Raymond James Financial Advisor renders advice on tax issues, these matters should be discussed with the appropriate professional.

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