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# SOUTHWESTERN

INVESTMENT GROUP

## SCROGGINS WEALTH TEAM

### Summer 2021 Newsletter

*Please forward this information to any friends  
or family who may need it.*



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Summer is here and it's a time for sunshine, swimming and gathering with friends and family. And the fact that we actually can be together again makes this year extra sweet. With a crazy year behind us and the hope of clear skies on the horizon, it's the perfect time to let go, appreciate the simple things in life, and reconnect with the people and things you hold nearest to your heart.



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Please enjoy our Summer Newsletter, full of resources to help you succeed, personal updates and other useful news from the Scroggins team



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## VIDEO RELEASE: [Measuring Investment Success](#)

For many who invest, it can become easy to have your focus swayed by politics or trends. So much so that it can muddy up one's personal and financial goals. That's why it's important to periodically take a step back and reassess what those goals are and determine what achieving said goals actually looks like. In this video, Will and Jesse go over three fundamental steps one can take to become a successful investor.

Watch it here: <https://youtu.be/lXTT5KAeCjM>



## VIDEO RELEASE: [3 Classic Investor Mistakes](#)

In the past year, there has been much uncertainty. With that uncertainty, there has been plenty of opportunities for investors to make mistakes.

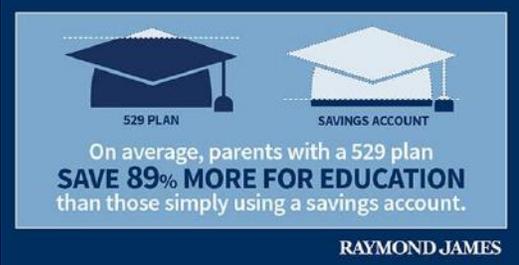
To help avoid such missteps, Jesse and Will have made a video, outlining three of the most common mistakes investors make and what can be done to avoid them.

Check it out

here: <https://youtu.be/jRdVhcvuLN>  
[E](#)

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## Did You Know...



The infographic features two graduation caps. The left cap is dark blue and labeled '529 PLAN'. The right cap is light blue and labeled 'SAVINGS ACCOUNT'. Below the caps, the text reads: 'On average, parents with a 529 plan **SAVE 89% MORE FOR EDUCATION** than those simply using a savings account.' The logo 'RAYMOND JAMES' is in the bottom right corner.

*Investors should carefully consider the investment objectives, risks, charges and expenses associated with 529 college savings plans before investing. More information about 529 college savings plans is available in the issuer's official statement, and should be read carefully before investing.*

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## Welcome to the World, Baby Frank!

Big news! Will and Caroline's family was made one larger with the addition of little Frank Scroggins. Mother and baby are both doing great and Dad couldn't be happier!



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### **Happy 5 Years, Jesse and Jessica!**

Congratulations to two of our very own Birmingham team members, Jesse Scroggins and Jessica Landry, who both recently celebrated five years with Southwestern Investment Group. Thank you for your diligent service and for all you do for your clients. The incredible growth we've experienced these past five years couldn't have happened without your contributions. Cheers to you two!





## **Easter Sunday**

Jesse, Hannah, Teddy, Levi and Easter first-timer Eleanor put on their Sunday best for a day full of fun, family and faith.

Meanwhile, Will and Caroline let little Lucy flex her curious nature by embarking on her first Easter egg hunt. Hopefully she learned some valuable strategies she can pass on to her baby brother, Frank!

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## **Scroggins Wealth Team**

### **Southwestern Investment Group**

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*The Investment Management Consultant designation is awarded to those who complete the Raymond James Institute of Investment Management*

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