



CLARITY | CONFIDENCE | STRUCTURE

Common Centiments

Letter from Tripp and David

Estate planning is one of the most important financial steps you can take, but it's also one of the most overlooked. Too often, families face unnecessary stress, delays, and financial burdens due to easily avoidable mistakes. Whether it's failing to update documents, overlooking key beneficiaries, or not having a plan at all, these missteps can create significant challenges for loved ones.

That's why we're excited to invite you to a special webinar on April 3, where we'll be joined by Kelli Wolk, Cobb County's Chief Probate Judge. Judge Wolk has firsthand experience seeing how estate planning mistakes impact families and will share key insights on how to avoid them. This is a rare opportunity to hear directly from an expert who navigates these issues every day. Whether you have an estate plan in place or are just getting started, this conversation will provide clarity and guidance to ensure your wishes are protected.

We hope you'll join us for this invaluable discussion. Details and registration information can be found below.

Looking forward to seeing you there!

Tripp and David

Upcoming Events

Webinar

ESTATE PLANNING WEBINAR

Common Mistakes | Smart Solutions

Please join us for an Exclusive Conversation with Chief Probate Judge Kelli L. Wolk, as we discuss the most common estate planning mistakes seen in Probate on Thursday, April 3, 2025 at 3:00 PM EST. Please RSVP to Vidya Kumar, our Client Relationship Manager at vidya.kumar@boyer-ramey.com.

Thursday | April 3 | April 2025

www.boyer-ramey.com/webinars

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Centsational News

wisdom from the watercooler

Spotlight: Susan Boyce, Director of Business Strategy

Recently, I had the incredible opportunity to visit my son, Cole, at Texas Tech University for Mother's Weekend. As a freshman, he recently finished pledging Phi Delta Theta, making this visit even more special.

The weekend was filled with meaningful moments - two wonderful dinners with other moms, getting to know Cole's new friends and their families, and cheering on the TTU men's basketball team, currently ranked in the NCAA top 10! It was heartwarming to see how strong and welcoming the Texas Tech community is. Meeting the families of Cole's friends gave me an even greater sense of appreciation for the connections he's forming and the support system he has around him.

Beyond the planned events, what stood out most was simply watching Cole embrace his new home. He's fully leaning into Texas life (hat and mustache included!), making lifelong friendships, and settling into the place where he'll spend the next four years. As my youngest and the last to leave for college, this visit brought a deep sense of peace and happiness. There's nothing better than seeing your child thrive in a new environment, surrounded by great people and exciting opportunities.

And the best part? Dad's Weekend is coming up soon - another great chance for parents to experience this special time with their sons. I'm so grateful for the warm and welcoming community in Lubbock and look forward to making even more memories in the years ahead!

Cents of Belonging

Our Community

Cobb Youth Leadership: Investing in the Next Generation

At Boyer Ramey Wealth Management Group, we believe in giving back to the community and investing in future leaders. That's why Tripp is actively involved with Cobb Youth Leadership (CYL) as Vice Chairman and member of the adult steering committee.

CYL is a leadership development program for high school juniors across Cobb County, organized by the Cobb Chamber of Commerce. The program selects a diverse group of students each year to participate in hands-on experiences designed to enhance their leadership skills, civic awareness, and personal growth. Through interactive sessions on topics such as government, business, and community service, CYL empowers young leaders to make a meaningful impact in their schools and beyond.

We're proud to support this initiative and help shape the next generation of leaders in our community!

Common Cents Cinema

your channel for finance

The Estate Plan

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Need a sounding board or a Second Opinion?

Schedule a meeting with our team to review your existing investment strategy and discover if your plan truly aligns with your long-term goals.

LET'S TALK

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meet your Common Cents team



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