



NAVIGATE FINANCIAL

Charting Your Journey

To our valued clients-

During these uncertain times, your health and well-being are of the utmost importance to us at Navigate Financial. As we all monitor the developments around Coronavirus COVID-19, we want to make sure that our clients, as well as our own families, are safe and taking precautionary measures to remain healthy.

We want to reassure you that our team is here for you. We understand that this pandemic presents concerns not only for health impacts, but also for financial impacts. While we have taken steps to work remotely, we are still available to you by phone or email, just as we were before. We are continuing to operate, and do not consider the office closed. I am still spending time regularly in the office (but be sure to call before stopping by; we want to make sure we accommodate you).

As I said, we are continuing operations which means we are continuing to have and to make appointments. Tammy is in the process of converting existing appointments into online video chats or teleconferences. We use the free online video conferencing program called Zoom because we like the personal video connection while maintaining the needed social separation. This is currently my preference for appointments and meetings.

Do you have a meeting scheduled with us in the next few weeks? We will reach out to you with detailed instructions on how to connect with us via Zoom. Should you not have the capability of using Zoom, we will set up a teleconference. We will still have April and May review meetings, so some of you will be hearing from us as we schedule these reviews, again through Zoom or by telephone.

Do you need to schedule a meeting with us? Please give the office a call and we will be happy to get something scheduled. I want to assure you that Zoom online meetings are not only easy and convenient, but also a safe platform with which to share portfolio information.

Please feel free to call us at our regular office phone number with any questions or concerns or email us at any time (360-628-8175 or Nancy@navigatefinancialnw.com). Please don't hesitate to reach out to us here at Navigate Financial.

We wish you all health and peace as we navigate the next few weeks together. Stay safe, wash those hands and enjoy your time at home. Focus on what you can do, care for yourselves and those you care about. Take Care.

Sincerely,

Nancy J. LaPointe

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STAY CONNECTED

