



WEALTH eTHOUGHTS Newsletter

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Retirement is a journey. Let us be your guide.

Celebr18 the New Year

We hope 2018 is off to a great start for you and your family. A new year is the perfect time to make positive lifestyle changes, so this year, we are planning a community workshop on how to stay Healthy, Wealthy and Wise, which we will host later in the year. Stay tuned to KWP publications for details!

We look forward to the privilege of continuing to serve you.

Sincerely,

Paul King, CFP®
Registered Principal
LPL Financial

If Disaster Hits, KWP is Prepared

In November, 2017, The KWP team dedicated a day to disaster preparedness. With the help of LPL, we created a Business Continuity Plan (BCP) and put it to the test. We met at an alternative location, which we would have to do if our office was not accessible due to some type of disaster. We were able to put remote strategies into action and were able to transact “business as usual” at the recovery location. We identified best practices and lessons learned, and made changes to our BCP based on the outcomes of the test day.

We audit the plan each year and will continue to do so. We have a summary of our Plan on our website under Client Resources/[Business Continuation Plan Summary](#).

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Important Links:

www.kingwealth.com

[Events](#)

[Client Resources](#)

[Ask an Advisor](#)

[KWP Publications](#)

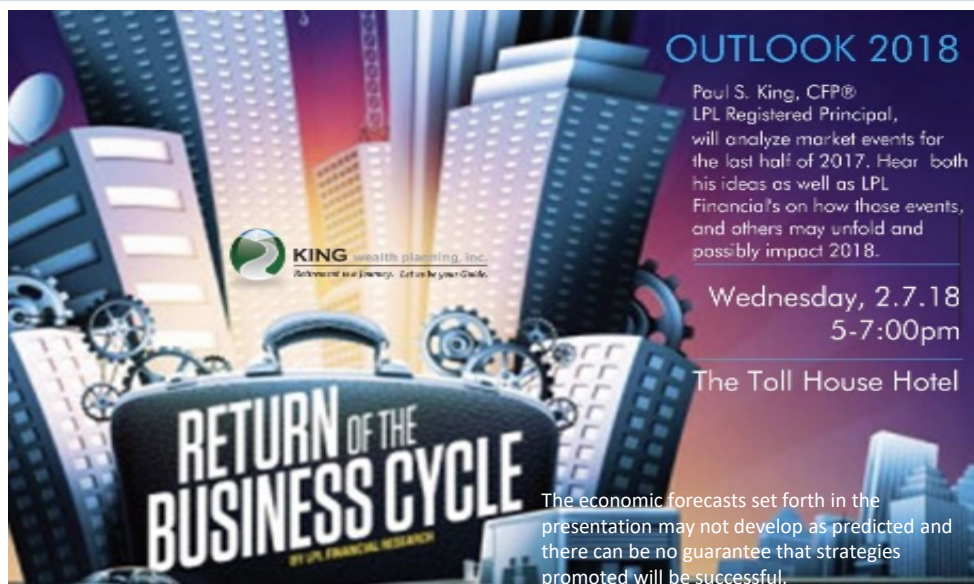
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Holidays Continue

KWP had its annual Staff Holiday Party in January at Boulder Ridge. Generally, December is such a busy month, we find it better to celebrate in January. It was a great time together as we re-connected with each other and spouses/significant others. A lovely dinner was followed by white elephant shenanigans. We have such a great group of employees, we are continually honored to share a snippet of the holidays with them. KWP kicks off the year with a celebration, which took place after our first 2018 staff retreat (that same day). KWP is definitely Celebr18!

See photos on our facebook page:
<https://www.facebook.com/kingwealthplanning/>

Client Advisory Council

KWP conducts a Client Advisory Council Meeting twice a year,

in Spring and Fall. A group of clients come together with Paul and Shannon and discuss KWP's direction and client service strategies.

This is a vital part of our continuous improvement process and we need direct client input to address current strategies and how to strengthen them and brainstorm new ones. So many great ideas come from the gathering of minds in these meetings and we feel it is something that sets us apart from other Financial Planning Firms. Client Advisory Council Ambassadors are recognized for their two-year service with special badges they wear to client events. KWP also conducts client satisfactory surveys quarterly, so if you receive one, be certain to complete it and let us know how we are doing.

At KWP, we want to do our best for your family. That's why we love hearing from our clients and their families. If you have any feedback you'd like to share with us, [get in touch](#) with us or reply to this email.

Outlook 2018

The annual Outlook Report is scheduled for Wednesday, February 7, 2018, 5-7:00pm at the Toll House Hotel in Los Gatos. We offer these market reports at the beginning and the middle of each year. We want our clients to have the opportunity to learn about market behavior and trends, and also have a chance for clients to connect with each other. Client Advisory Council Ambassadors are there and can help potential clients feel at home, while giving them a glimpse into the comradery of the KWP family. We are looking forward to seeing you all at the event, it is right around the corner!

[Register](#) for the Outlook Event!

See our upcoming events for 2018 here:
<https://www.kingwealth.com/2018-events>

