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to Maintain Lifestyle
& Financial
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A Case Study of the Freedom Private Fiduciary Services Offer

Creating the life you want to live requires a little help, especially in retirement, which is precisely what a private fiduciary offers. These services aren't a surrender to age – private professional fiduciary services are the pathway to the freedom and prosperity you need to make the most of this exciting chapter of your life. Nothing illustrates the importance of private fiduciary services more than a case study of a woman who came to us to help her live out the retirement she always dreamed of.

A Case Study: How Expert Private Fiduciary Services Help Seniors Make the Most of Their Retirement

Meet Miss F, a woman who did not allow time to slow her down. She demonstrates how private fiduciary services are a gateway to freedom and a retirement that feels more like a holiday in a tropical paradise, soaking up the sunshine while the ocean laps onto the beach.

At 92 years old, Miss F was still sharp as a tack with an incredible memory and showed no concession to age. After all: What is age if not just a number?

In one life, Miss F packed in enough experiences to possibly fill two or even three lifetimes, from being in Pearl Harbor the tragic day it was bombed to the luaus she attended well into her 90s. She understood that retirement is an opportunity for new adventures and experiences.

Like so many other seniors who want to make the most of their retirement, Miss F kept busy and mined her golden years for all they had to offer. She invested her retirement funds to create an impressive nest egg that continued to grow.

When other people may have been watching TV for leisure, Miss F was watching the stock market vigilantly, buying and selling stocks. Throughout her investing, Miss F amassed quite a large estate.

What's the use in creating a fortune if you don't have the time to enjoy the fruits of your labor? Miss F was the life of the party, and we can attest that Miss F wanted to make the most of this exciting life chapter.

St. Patrick's Day Celebration

Do you have your green clothing all ready to go for this St. Patrick's Day? Whether you're Irish or simply just Irish at heart, March 17th is the day people across the world celebrate St. Patrick's Day by attending religious services, parades and lots of eating and drinking of traditional Irish foods and beverages!

History of St. Patrick's Day

St. Patrick's Day is a celebration of Irish history, heritage and culture. The Irish began immigrating to America as soon as the English started colonizing in the 1600's, although the years during the Great Potato Famine in Ireland (1845-1853) brought the largest number of Irish immigrants to America. Over 2 million Irishmen, women and children left Ireland for America, which was over a quarter of the population of Ireland at that time. The Irish brought with them a strong sense of tradition and heritage, which we still celebrate today.

St. Patrick's Day is a day of commemoration for the patron saint of Ireland, Patrick, who passed away on March 17th, 461. For centuries, this day was just a religious holiday celebrating the life of St. Patrick. The first St. Patrick's Day parade was held in New York City in 1764. The first continuous St. Patrick's Day parade was started in Savannah, Georgia, in 1813 and

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What Our Clients Say About Us

"Marcia has been someone I could count on to always perform impeccably and has been a tremendous asset to her clientele. She is a compassionate, highly detailed professional, who truly cares about senior clients."

-RM

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 continues to this day. Over the past 50 years, St. Patrick's Day has become a more secular celebration. Cities and towns across the globe have parades in celebration of Irish culture. The largest parades are in New York City, Chicago, Boston and Savannah. But many other cities have long traditions of parades, including Cleveland, which has held a parade for the last 150 years.

Ways to Celebrate: Traditionally, Americans celebrate this holiday with parades however there are many fun ways to celebrate St. Patrick's Day. Here are just a few:

- Feasts: Create the ultimate Irish feast with corned beef and cabbage, a side of Irish Soda Bread, and shepherd's pie. For dessert, you can make St. Patrick themed treats featuring green-colored dye, shamrocks, and leprechaun hats.
- Parades: With many parades canceled this year, find one of the many St. Patrick's Day parades featured on YouTube to help get in the spirit!
- Wearing Green: Do not forget to wear green, or you may get pinched. This tradition stems from the belief that leprechauns, who enjoy tricks and pinching people, could not see you if you were wearing green.

Did You Know?: There is a lot to learn about this Irish holiday. Here are a few St. Patrick's Day fun facts to get you started:

- The shamrock is Ireland's national plant and was used in illustrations by St. Patrick to teach the Holy Trinity.
- While green is the present-day color of St. Patrick's day, the traditional celebration color was blue.
- Corned beef and cabbage, a popular St. Patrick's Day dish, was created in America by Irish-Americans who could not afford ham. Traditional feasts in Ireland usually include lamb and bacon.
- Pubs in Ireland used to be closed on St. Patrick's Day because it was a religious holiday. In the 1970s, the Irish government allowed pubs to be open to promote St. Patrick's Day as a tourist and cultural attraction.
- Leprechauns have their own holiday on May 13th but are commonly associated with St. Patrick's Day.

Whether you are watching the parades or having an Irish feast, there are many ways to celebrate! We wish you a safe and happy St. Patrick's Day!

Source: <https://www.asccare.com/st-patricks-day-celebration/>
 Please contact our office for more information.†



You can e-mail us at
Allison@MCampbellCPA.com
 to receive your newsletter
 by e-mail!

A Case Study of the Freedom Private Fiduciary Services Offer.....
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 This was running through Miss F's head as the amount of piling paperwork from the brokerage houses and stock companies kept pace with her growing estate. She decided it was becoming too time-consuming and too much of a hassle to manage alone.

Seeking a solution, Miss F came to Marcia L. Campbell for help. Miss F sincerely appreciated that, when it comes to our private fiduciary services, we create long-lasting partnerships and collaborate with our clients.

We knew she would be actively involved and embraced that wholeheartedly. We cherished working with her. She continued controlling her investments and told us when she wanted to buy or sell, and then we would work with her broker.

"Our private professional fiduciary services were able to give her the retirement she always dreamed of, though we'd be lying if we didn't admit it was hard keeping up with her because she was so spry and full of life. In fact, her broker was 85 years old, and Miss F even thought he acted old!" Marcia L. Campbell, a CPA and private fiduciary explained.

Private Fiduciary Services that Empower Seniors to Enjoy Life to its Fullest

This chapter of your life is an opportunity to live out your dreams that only comes once in a lifetime, and private fiduciary services can make the retirement of your dreams a reality. Miss F is a shining example that age doesn't have to slow you down, and a private professional fiduciary can ensure the paperwork and other complex tasks involved with managing your finances won't slow you down either.

At Marcia L. Campbell, CPA, we offer professional fiduciary services that empower seniors to live out the retirement they've always dreamed of. With us, you can rest easy knowing your financial affairs are in expert hands. Contact us to learn more about our fiduciary services.

Source: <https://mcampbellcpa.com/case-study-private-fiduciary-services/>

Please contact our office for more information.†

When one door of happiness closes, another opens, but often we look so long at the closed door that we do not see the one that has been opened for us.
 —Helen Keller