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# *the* Plan

## FINANCIAL PLAN IS MOVING

After 17 years in our downtown office, Financial Plan is moving to a new office location. Beginning October 1st, 2014 our office will be on Barkley Blvd. Our new address is:

**Financial Plan, Inc.**  
**2115 Barkley Blvd, Suite 101**  
**Bellingham, WA 98226**

Our telephone and fax numbers remain unchanged, as will our email and website addresses.

We will miss our quaint downtown location, so why are we moving?

### Financial Plan is Growing

Thank you so much for the introductions you have made to your co-workers, friends, and family. We sincerely appreciate your confidence in us, and we will do all we can to help anyone you send to us. In order to give close attention to each new client, we will need new advisory and operations staff. With six people, we are already bursting at the seams in our current space. Our new office is big enough to accommodate ten employees.

### Parking

As much as we love to support our local meter-maids, it is an inconvenience for everyone to be worrying about feeding meters and finding a space. The new office has parking specifically reserved for you within a few short steps of the office entrance.

### A Central Location

Our new office is more centrally located; closer for our clients who live in the North county, yet still quite close for those who live to the South and with quicker access from the freeway.

### Community Presence

As the most successful fee-only advisory firm north of Everett, we have been Whatcom County's best kept secret. That is changing as we become more involved in community sponsorship, as word-of-mouth from our clients increases, as our articles are published in trade magazines, and as our online footprint expands. Our new office will have signage to reflect our more visible presence within the community.

[YOU AND YOUR GUESTS ARE INVITED](#) to an Open House to be held at our new office on:

**Tuesday,**  
**October 14th**  
**2:00PM to 8:00PM (drop in)**

Come tour our new office, visit with the entire staff, and enjoy drinks and appetizers with us! This is also a good opportunity to bring along your friends and co-workers to meet us in a casual atmosphere. We look forward to seeing you then!

With fondness from your Financial Plan Family,

Jamie

Dave

Devin

Nathan

Jeanne

Bonnie





# on a Personal note

## Jamie & Jeanne



Just a week ago Jeanne and I took a family mob up to Artist's Point and hiked the Chain Lakes loop. We started along Ptarmigan Ridge, had a picnic at Iceberg Lake and hiked out over the table mountain ridge. It's an eight mile loop with some steep ascents and descents. My son Matt carried little Oliver in a backpack. The theory was that his four year old son Sammy would walk under his own power at least on the flat portions of trail.

Houston, we have a problem: Sammy didn't get his nap, and Matt had to carry him practically the entire way! I had a backpack full of picnic and fishing gear myself or I would have helped out. As it was, Matt had both Sammy and Oliver on his back. C'est la vie!

At the end of it all, poor Matt had to run the two miles up the steep Wild Goose trail to retrieve our truck. He treated it all as a work out challenge, and had a great time doing it; that's just his way. It was a beautiful day for fishing and huckleberries, and a good way to finish a magnificent summer.



Matt as beast of burden, with Sammy and Oliver

## Devin & Stephanie

As you have probably noticed from previous newsletters, my family is very important to me. Typically I write about the kids (let's face it they are way too cute and entertaining to be ignored), but this time I want to write about my amazing wife, Stephanie.

Not only does Steph have the difficult job of raising three kids, but she also has to put up with me:) Too often she willingly puts our wants and needs above her own, so when she told me she wants to run a marathon I told her I would support her any way I could. Little did I know that meant I would be running the marathon with her!

We crammed an 18 week training program into 12 weeks, began switching off who got up early to run before I left for work, and enlisted the help of family to watch the kids on a few of our long runs so we could run them together. September 28th is the big day, so hopefully we survive!

As you know I'm not built to be a distance runner, but I am so happy to be able to check this off the bucket list with Steph. Not only will the kids know that mom is smart and loving, but this is a reminder she's pretty tough too! I am lucky to have an amazing wife that is beautiful, intelligent, loving, and supportive. I am thankful every day for the work she does raising our kids and being someone they can look up to.

## Nate and Lisa

After months of arduous study, preparation and internal doubt, I sat for and passed the CFP® certification examination this past summer. I just recently had my experience vetted and background checked to make sure I'm not a public menace, and have now been granted the right to use the CFP® marks.

All of the advisors at Financial Plan Inc. could have any number of letters and designations, but most are meaningless and we chose to forgo them. The CFP® letters require some of the highest standards in the industry, and I am proud to join the other advisors in holding this designation.



I'm sure my family appreciates this accomplishment as well, as much of my time after work was spent studying rather than spending time with them. This is just one of the milestones of my career, and I hope to continue to progress in my education, understanding and expertise. With the upcoming move, I'll finally also have my own office space!

## David & Bonnie

Well this summer was a *highlight* just seeing my husbands life long dream of having his own boat fulfilled! We did everything he imagined. We spent time at the lake pulling the kids on the tube. We caught just a ton of crabs in the Bay, and we took advantage of the *record run* of salmon up on the Fraser River in B.C. Kristin, James & I all caught our first salmon...and I even caught my first KING. Dennan didn't quite have the patience but he tried. It has been fun finally being able to share this passion with David. We have had a *great* summer! Now we are busy with Football (David coaching James team), Kristin doing Girls Fastpitch and Dennan taking the lead in his 6th grade musical. There is never a dull moment!

