

# QUARTERLY NEWSLETTER

APRIL 2023



HIGH POINT  
FINANCIAL GROUP

We hope this newsletter finds you in good health and high spirits. As we head into a new year, it's a great time to reflect on our financial goals and take stock of where we are on the path to achieving them. That's why we're excited to share this latest edition of our newsletter, which is full of insights and updates that can help you make informed decisions about your finances.

In this issue, we'll cover a wide range of topics that are relevant to your financial well-being, including tips for saving money, strategies for investing, and advice for managing debt. We'll also provide updates on the latest economic trends and market developments, so you can stay up-to-date on the factors that may impact your investments.

As always, our team of experienced financial advisors is here to support you every step of the way. Whether you're just starting out on your financial journey or you're a seasoned investor, we're here to provide the guidance and expertise you need to reach your goals.

Thank you for entrusting us with your financial future, and we look forward to continuing to serve you in the months and years ahead.

Best regards,  
The High Point Team



## TAKE ACTION WITH YOUR FINANCES

If you're looking for a partner who will guide you and empower you to take the right action with your finances, we'd love to talk.



# Spotlight Advisor

# Konrad Korth



Konrad Korth is the newest member of the High Point team in Northern Colorado. After gaining real world experience as a small business owner and Navy SEAL Coach, he learned that this true passion was in the financial services world. Konrad started his career in the finance world with New York Life where he quickly ascended to the honor of Executive Council in his first six months as an agent. He also holds the honor of being a member of the elite Million Dollar Round Table.

Konrad is an avid outdoorsman and running enthusiast. He frequently participates in ultra marathons, and this last summer was the pacer for two runners in the Leadville 100. If you need a new running buddy, he is your guy. Join him for one of his many runs in Northern Colorado. Konrad lives in Northern Colorado with his wife and two children.

**What is your favorite part of your job?** My favorite part of the job is coaching people to do uncomfortable things to better themselves. From the financial world to running to swimming, I thrive in scenarios where I am able to push those around me to be their best selves.



**What do you like to do when you're not in the office?** I like to be outside, whether it be running, hanging out with my family, hiking or biking.



**If you weren't an advisor, what would you want to do instead?** I would be a swim coach. I have a background in training Navy SEAL candidates to swim and owned a youth swim team.



# What You Need to Know

# Events & Key Articles



## Events

We are so excited about our partnership with Run.Windsor. Make sure to get signed up for these upcoming races. Click [here](#) to join!



## Key Articles

PERSONAL FINANCE

**5 tax and investment changes that could boost your finances in 2023 amid economic uncertainty**

Click on the article to learn more about tax and investment changes in 2023.

Do you have a 529? Click on the article to learn about potential for rollovers.

**529 Plans Get a Boost With Tax-Free Rollovers to Roth IRAs**

**Warren Buffett's Dropped Some Pearls Of Wisdom**

Click on the article for tips and tricks.



What is your financial plan? Click on the article to learn about the benefits of having a solid plan to reach out goals.

**The power of comprehensive goals-based planning**

## A Note From Us:

Our office has had some big changes occurring lately. Jessica is relocating with her family and will be working remotely. We are excited to welcome the newest member of our team, Mackenzie Lang. She will be greeting clients with a smile as the new face of High Point Northern Colorado. She will be featured next quarter as the spotlight in our newsletter.

As the weather turns warmer we hope that you are able to get outside and enjoy some sunshine! **Happy Spring!**