MESSICK PEACOCK & ASSOCIATES

QUARTERLY NEWSLETTER

1QTR 2025

At MPA, we focus on values and aligning firm values with those of our clients. We focus on deeper understanding of our clients' life goals, personalities, challenges, and fears. Why? So that we can better serve you, meet you where you are in your journey, help clear the noise, and provide the best client experience possible. We strive to not just be financial planners who manage your assets. Why? We believe it is so much bigger than that and that our clients deserve more. Asking "why?" is something we are intentional about at MPA. Our team is here to help you remove obstacles that may stand in your way of achieving your dreams.

Our team knows that holistic planning is critical to reach not only your financial goals—but your life goals—and we are here to help. The MPA team can help with determining your core values, assisting with financial education for your children, planning for retirement or coordinating next steps for an upcoming liquidity event. We can help you determine your personal "why".

We strive to help you reach your goals and to help you navigate the ongoing ups and downs that we all experience in life. We understand it can be challenging to stay the course, especially in such volatile times. At MPA we realize change isn't easy, yet adapting to the times and working to discover opportunities has usually proven more successful than acting on fear or emotions.

Please don't hesitate to reach out to the MPA team with questions or suggestions. We wish you a happy Spring!

All the best,
Your MPA Team

MPA Masters WATCH PARTY

Thank you to everyone who joined us for MPA's Masters Watch Party!

It was a fantastic time with great food, great company, and, of course, the excitement of the Masters. Events like this remind us of the value of **#connection**, and we're grateful for the opportunity to share it with all of you!

#neverstopgrowing

Congrats Chris!

Chris Messick has been named a Best-in-State Wealth Advisor by Forbes!

See the full 2025 rankings here:
https://www.forbes.com/best-in-state-wealth-advisors/

2025 Forbes Best-in-State Wealth Advisors, developed by Shook Research, is based on the period from 6/30/2023 to 6/30/2024 and was released on 4/8/2025. 48,944 nominations were received and 9,722 advisors won. Neither Raymond James nor any of its advisors pay a fee in exchange for this award. More: https://bit.ly/3E2gIf4. Please see https://www.forbes.com/best-in-state-wealth-advisors for more info.

WORTHWHILE

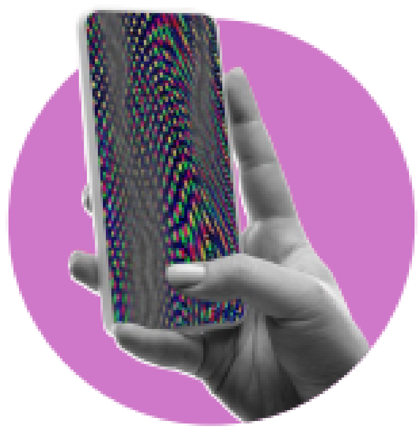
Spring 2025

A publication of thoughtful insight dedicated to the life well planned.

ADVANCE CARE PLANNING

End-of-life care decisions for a loved one are never easy, but having thoughtful conversations and documenting their wishes early can provide clarity and peace of mind for everyone involved. **p10**

THE DUAL NATURE OF SOCIAL MEDIA



There are two sides to social media: one that presents opportunities and potential, another that poses risks. Ultimately, it’s temperance and intent that will determine which side you land on. **p14**

PANDEMIC-FUELED YOLO SPENDING

You only live once. This sentiment rang truer during COVID-19, and our spending habits reflected that. How long will consumers splurge on cavier with a shrimp cocktail budget? **p20**

MICHAEL CLINTON

Re-Imagineers

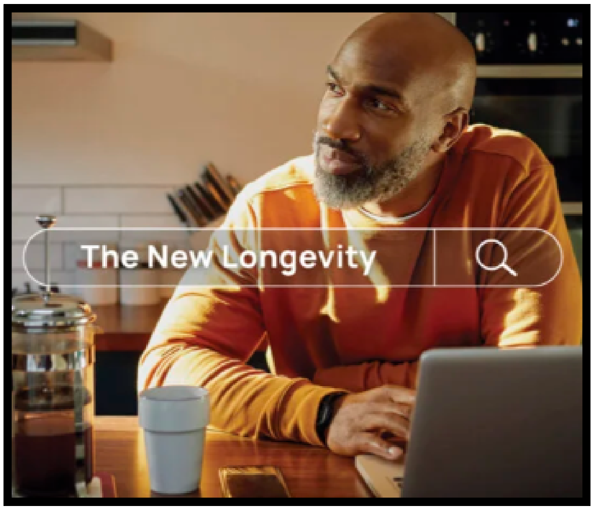
ROAR forward

The ROAR Report: Issue # 8

Lorraine Cortés-Vázquez is Making New York the Most Age Inclusive City in America

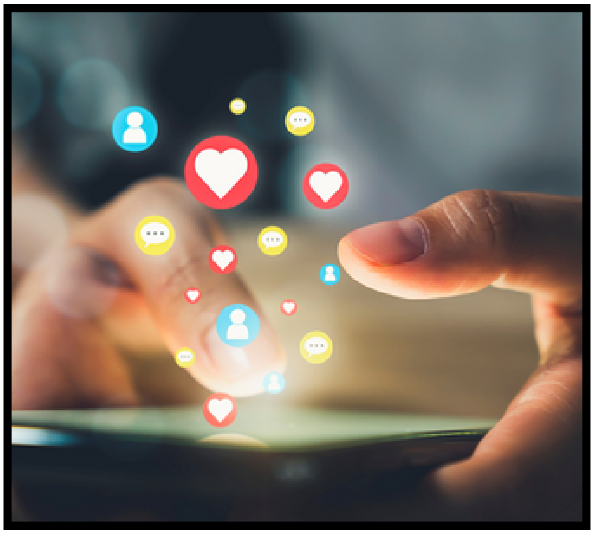
By Mark Healy

Our first Longevity Innovator, Lorraine Cortés-Vázquez, Commissioner of the New York City Department for the Aging, is a true change agent for people 60+ and the Big Apple. **READ MORE**



Three Things You Need to Know

As our careers and workplaces undergo a revolution, both employers and employees are seeing new professional paths and changes in the workplace. **READ MORE**

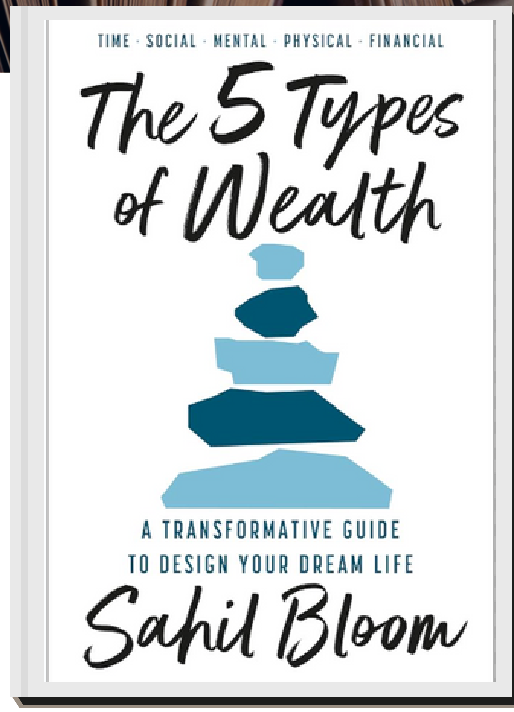


Brands Not Selling to 50+ on Social Media Are Missing Out on Billions

By Tony Case

The 50+ demo, which has an average net worth of nearly $1 million, is actively shopping on social media and is taking a deliberate approach to making those purchases. **READ MORE**

Recommended Reading



We're always on the lookout for thought-provoking reads—and this one stands out. It challenges the traditional idea of wealth and instead invites you to design your life around **Five Types of Wealth: Physical, Social, Time, Mental, and Financial**.

Here are a few questions that stuck out to us:

Physical: Want to be active and thriving in your later years? Build habits now that support movement, healthy eating, and rest.

Social: Who are your people—the ones who'll be there no matter what? Those relationships deserve your time and energy now.

Time: Are you moving through life on autopilot or living with intention? Time doesn't come back—spend it where it counts.

Mental: Do you have space in your life to think, dream, and get clear on what matters? Your purpose deserves your attention.

Financial: Have you defined what "enough" means for you? It's easy to compare—harder (but better) to stay focused on your own goals.

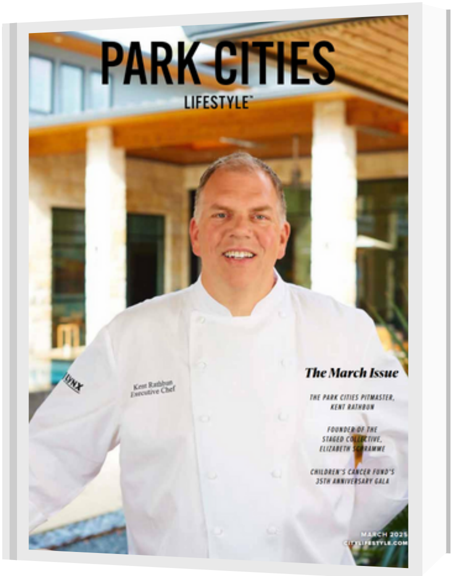
"It isn't what a man has that constitutes wealth—it is to be satisfied with what one has—that is wealth." – Mark Twain

If you're curious how you're doing in each area, this quick assessment is a great place to start: 🔗 https://lnkd.in/gzTkRV88

PARK CITIES
LIFESTYLE™

January

February



March

The Golfers Journal
Join host Tom Coyne as he travels the country interviewing the most interesting people in golf.

The Deep Dive Podcast
Experience the engaging discussion as our CEO, David Peacock, joins Jay Hummel on The Deep Dive podcast.

Kitces and Carl Richards Podcast
A no-holds barred conversation for Real Financial Advisors with industry nerd Michael Kitces and client communication expert Carl Richards. One draws with a Sharpie, the other nerds out with spreadsheets, and both provide you with unique perspectives so that you can more effectively communicate with and serve your clients, run a more fulfilling practice, and maintain a healthier lifestyle.

LET'S STAY CONNECTED

Keep yourself informed about the newest updates from MPA by connecting with us on LinkedIn. We prioritize staying connected, so make sure to click that follow button to stay updated regularly.

NEVER STOP GROWING

Achievement | Competence | Connection | Empathy | Optimism