

My Atlantic Wealth

SPRING EDITION 2019

Capturing a Lifetime of Memories: Priceless

How to create an invaluable gift for your loved ones.

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From Our Corner

Spring is here! Catch personal updates from the lives of the Atlantic Wealth staff.

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THE FREEDOM TO LIVE INSPIRED

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A Spirit of Generosity

By Greg Patterson

I've been reflecting on philanthropy, a word that is simply summed up in the virtue of generosity. The University of Notre Dame's Science of Generosity Project defines generosity as "the virtue of giving good things to others freely and abundantly." I would add this can be expressed in many forms whether in the giving of one's time, talents or financial resources without the expectation of anything in return. Research conducted by The University of Notre Dame links generosity with the same neurochemicals as oxytocin, a hormone associated with human connection and empathy. In the Bible we read in the book of Acts that Jesus said, "It is more blessed to give than to receive." In 1 Timothy we read, "As for the rich in this present age, charge them not to be haughty, nor to set their hopes on the uncertainty of riches, but on God, who richly provides us with everything to enjoy. They are to do good, to be rich in good works, to be generous and ready to share, thus storing up treasure for themselves as a good foundation for the future, so that they may take hold of that which is truly life."

I believe there is joy in giving. Even beyond financial giving, this extends to sharing our time and talents. Recently, we were helping a client update their estate plans and the subject of giving came up. The client had intentions to leave assets to charity and their church when they passed away but were considering what it would be like if they gave these assets while they are living. We explained you can "do your giving while you're living so you're knowing where it's going." They smiled at our rhyming and sought to understand how they could accomplish this and see their gift in action rather than it pass through their estate after they are no longer here. The planning to help them accomplish this was exciting for us, partly because of the research mentioned above and because we enjoy coaching our clients to realize their dreams and reach major milestones. Seeing their faces as we talked through this made our day and I know the charitable organizations will benefit tremendously from the generosity of our clients' gift in the present.

We all have the power to make a difference. Remember too that generosity is contagious. The next time you are at a drive-thru and someone in front of you pays for your meal, you know the feeling – you are compelled to pay it forward. It can begin a huge chain reaction. We offer the opportunity to discuss your philanthropy goals and ways you can be generous with what you have. There are financial planning tools that can illustrate how proper planning can move an estate gift to a current gift and unlock a chain reaction to be a blessing in the present. Let us know if you would like to explore this planning. We would be glad to facilitate this conversation among you and your loved ones. ■

"We make a living by what we get, but we make a life by what we give." — Winston Churchill



Capturing a Lifetime of Memories: Priceless

Presented by *Greg Patterson and James Allen Canady*

Money is important, but it is the people in our lives and our experiences that are often priceless. It doesn't take much to start capturing valuable memories—just a notepad, an audio recorder, a video camera, or your smart phone. While you could write down all the answers, it might be easier and more fun to record them for future generations to hear or, better yet, see! Other than that, the best advice is to be open and honest about your thoughts and experiences. This can be an invaluable gift to your loved ones, so try to include them in the process if possible.

Wisdom questions

- What values are most important for you to exhibit and to pass on to your kids?
- How have these values helped you in your life?
- How did you learn these values?
- What's a good way to teach them to kids?
- Who are your heroes? Why?
- What do you admire about your kids?
- What do you look for in a good friend?
- What has helped you most throughout your life?
 - Books
 - Family, friends, mentors
 - Skills, knowledge, behaviors
 - Organizations
 - Other
- What are some of the best financial decisions you've ever made?

- How about your best financial habits or practices?
- Where did you learn about money?
- What are some of the lessons that you picked up?

Questions about your life

- What are you most proud of in your life?
- What might you change if you could do it over again?
- What would you like people to think when they think about you?
- What do you know about your family history?
- What special things or memories do you have from your mom or dad?
- What was your favorite job?
- What are some of your most memorable stories? Think about when you were . . .
 - Falling in love
 - Raising your children
 - Visiting or living in interesting places
 - Going through moments of joy/sadness/struggle/success
 - Taught a valuable lesson
 - Proudest of each child

Questions about the future

- What do you hope you'll be able to do or see that you haven't done or seen yet?
- What would you like to do or see again?
- What are you most proud of about your family?
 - What steps can you take as a family to do more of that?
- If you woke up at 2:00 A.M., what might keep you awake these days?

- What is most important to you about where you live?
 - If you wanted or had to move from your house, what should others consider when looking at options?
- What plans do you have in place for your medical care if something were to happen?
 - Do you have a durable power of attorney in place?
 - Does it clearly state what your wishes are?
- Are you happy with your will?
 - Is it up to date, signed, and in a safe place?
- Do you have any advice for family members who may be creating a will?
- Is there anything others can do to help you? Or is there anything others should start helping with so they can learn more about it?

Final thoughts

This record never has to be “closed”; you can always share more about the life you have led, the lessons you've learned, and your plans for the future. The key is that you record what's most important to you. It is well worth the effort to create something priceless for your loved ones. ■

Greg Patterson and James Allen Canady are financial advisors located at Atlantic Wealth Management, 712 Bridges Street, Morehead City, NC 28557. They offer securities and advisory services as Registered Representatives and Investment Adviser Representatives of Commonwealth Financial Network®, Member FINRA/SIPC, a Registered Investment Adviser. They can be reached at 252-515-7800 or at greg@myatlanticwealth.com.

In the Life of Our Firm and Our Families

From Greg

Recently, Melissa and I were able to enjoy a weekend away in the Raleigh/Durham area at our two oldest daughter's homes. On Friday night we arrived at Alli and her husband Shelby's home and were treated to great fellowship and a delicious chicken dinner she cooked. We enjoyed the Carolina Duke Basketball game on TV and caught up with them until way too late in the evening. Saturday we joined up with our oldest son, Austin, who lives in Durham, and we explored the Farmer's Market in Raleigh together. We ate seafood, bought fresh honey, perused the vendor booths and had a great time hearing about how things are going in his life. Later in the afternoon we made our way to our daughter Caitlin and son-in-law Tyler's home in Wendell, NC for another home-cooked meal and watched home movies into the night. Melissa and I attended their church with them Sunday morning and enjoyed lunch at my favorite, PF Chang's in the Glenwood Mall.

I always enjoy being with my family and these times with our children, while all too short, remind me of how proud I am of them and how grateful I am to be their father. I love hearing about your families and learning more about your traditions and what is taking place in your lives. Time is the most precious resource we have and we only get this day once. Make the most with what you have and make plans to go see your children or call them. If you don't have children, maybe share that time with others who may be alone – you never know what giving your time to another can mean.

From JA

I'm excited to share with you all that is going on with the Canady's! 2019 started off with some tremendous blessings.



One of the sheep on the Patterson's farmstead.

On February 14th we officially adopted Nellie Pearl Canady! Nellie is a happy, energetic, funny, and athletic little girl. We are thankful that God has made her part of our family, and we look forward to all that He has in store for her. It was very exciting to go to the courthouse in Beaufort and sign papers to finalize the adoption. Nellie came to us when she was 10 ½ months old. Now at 2 years and five months old she is just two weeks older than Eliza.



We received another tremendous blessing with the birth of our second son, Jac Faircloth Canady. Jac was born on Thursday, March 7th at 21 inches long and 8lbs 2oz. His brother and all his sisters are excited to be able to hold him, love on him, sing him songs, and sometimes pester him – yes, they are already doing this so we have to keep an eye on them all!

So that makes six kids now in our house. Reese is 6 but will soon turn 7 in June. He is enjoying lacrosse and I am enjoying helping coach his U8 Coastal Renegades team. He continues to play drums at church.



Hello from healthy, beautiful baby Jac!

We still marvel at the talent God has given him and the blessing of leading worship alongside my son.

Sadie just turned 5 and has grown up so much in the last year! She is feisty and fun and is still enjoying gymnastics and art. Sadie loves playing with Reese, and holding her new baby brother and singing songs to him that she makes up. Eliza and Nellie and our foster daughter are all two years old so they enjoy being together all the time. There is never a dull moment in the Canady house, but now that the three little girls are starting to talk and communicate, there is never a quiet moment either! It is really cool to see the bond they have developed as "triplet" sisters as their personalities start to come out more and more.

Momma is still super-mom! She is busy now taking care of the newest addition to the family, but this has not slowed her down. In his first three weeks of life, Jac has been on a day trip with the whole family for Reese's lacrosse game and a river visit, to a birthday party for Sadie, to church with me, to all his doctor appointments, outside playing in the backyard, and he's shuttled Reese and Sadie around with Momma to all their practices and games. He is fitting right in!

Thank you for all your well-wishes and prayers! We appreciate the relationships we have with all of you and that we can all be part of the Atlantic Wealth family! As we read in Psalm 90:17, "Let the favor of the Lord our God be upon us, and establish the work of our hands upon us; yes, establish the work of our hands!"

From Kim

"S P R I N G" is finally here! It feels like it's been a very long winter but warmth is fast approaching. My excitement is mostly driven by my "side-kick", my 13-year-old miniature poodle, Bailey Clyde. Whether boating, sailing, paddle boarding, fishing, or simply walking the beach, he is all in and excited any time I pick up his leash. His playful spirit gets me up, out and on to new adventures to Cape Lookout, Shackleford Banks, Bird Shoals or a day on the beach! What a great time to move forward, to repair, rebuild, restore, renew, and continue to be grateful and humble in the reflection of where we have come and all that lies ahead in full bloom. ■

Simple & Delicious Strawberry Fat Bombs

Looking for a Keto-friendly snack? Here's a recipe that's fit for spring. If you give it a try, let us know what you think!

Ingredients

- 2 cups heavy whipping cream
- 5 strawberries, (large)
- 3 tbsp Swerve Confectioners
- 1 tsp vanilla
- Lily's Chocolate Chips (This brand is sweetened with Stevia)

Instructions

1. Dice and puree strawberries in a food processor then set aside.
2. Place all other ingredients into a large mixing bowl.
3. Mix with electric mixer until soft peaks form.
4. Fold in the strawberry puree.
5. Place cupcake liners into muffin tin.
6. Place mixture into a baggie or icing bag and pipe mixture into cupcake liners.
7. Freeze until firm (at least 1-2 hours)
8. Enjoy!

Atlantic Wealth Kids



The Canady kids are growing! Nellie (far left), Eliza, Reese holding Jac (center), Sadie, and our wonderful foster daughter (far right).

Offer to Help

We are honored to be the advisors you've chosen to help manage your financial life. In our experience, our clients who value the comprehensive services we offer often have a family member or friend who shares those values. If someone you know could benefit from financial guidance, or a fresh perspective on their retirement, we would be honored to help.

We are pleased to offer anyone you refer a no-obligation, complimentary financial review. Your continued trust in us is worth more than we can say. To refer someone, just call our office at (252) 515-7800.

Our Mission

Our advice and counsel is built on a foundation of faith, shared values, open communication and the highest integrity. With world-class service, we grow and protect our clients' hard-earned wealth so that they are free to live inspired.



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We recently visited Campbell University for an interview day with graduating finance students...we have exciting news to share very soon!