



GREAT DIAMOND
PARTNERS



Your Monthly Compass

NOVEMBER 2019

TAX LOSS HARVESTING

To reduce an investor's tax liability, stocks can be sold at a loss to reduce the capital gain earned on an investment. Capital loss is tax-deductible. Steve and Jack will be reviewing accounts and we will be in touch if this strategy is applicable to you. Reach out with any questions!



REQUIRED MINIMUM DISTRIBUTION (RMD)

Your required minimum distribution (RMD) is the minimum amount you must withdraw from your retirement account(s) each year, generally once you reach age 70 1/2. Andrew may be in touch to gather details from your prior firm statements or to distribute your withdrawal before year-end. Contact him with any questions:

Andrew Scott
Client Service Specialist
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YOU'RE INVITED

You should have received your invitation to our Holiday Open House as a separate e-mail last week.

We hope you can join us!

Client Holiday Open House
Thursday, December 12 | 4 PM - 7 PM

22 Monument Square
Suite 300
Portland, ME 04101



continued on pg 2

Happy Thanksgiving

We have much to be grateful for this season. A few of your team members have shared below what they are thankful for this Thanksgiving. Wishing you a wonderful day filled with warmth, happiness, gratitude and pumpkin pie!



"I am thankful for the guidance I receive from my coaches, colleagues at Great Diamond Partners and fellow business leaders. Running a business takes considerable effort and thought to address the many challenges. Fortunately, the answers are out there." - STEVE, FOUNDING PARTNER & CHIEF EXECUTIVE OFFICER -

"My husband and I share a family that is absolutely amazing (5 of 8 kids pictured: Blaine, Wyatt & Sydney with Blaine's fiancée Rebecca and Wyatt's girlfriend Samantha). I am blessed beyond words by these people – and these two pups (Humphrey & Buddy)." - HELEN, FOUNDING PARTNER & CHIEF FINANCIAL OFFICER -



"I am thankful for the opportunity to work with my spouse. Andrew makes everything in my life so much better. I'll take every minute I can spend with him!" - MEG, CLIENT EXPERIENCE SPECIALIST -



DISCLOSURES

Great Diamond Partners, LLC is registered as an investment adviser with the SEC. The firm only transacts business in states where it is properly registered, or is excluded or exempted from registration requirements. Registration as an investment adviser does not constitute an endorsement of the firm by securities regulators nor does it indicate that the adviser has attained a particular level of skill or ability.

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