



# ATHENA LEGACY SOLUTIONS

## NOTE FROM JANET

We're excited to share our first newsletter with you.

Think of this as a simple way for us to stay in touch—sharing helpful ideas, timely updates, and a few things we're seeing that may be worth your attention. You'll typically see this each quarter, and occasionally in between if something important pops up.

Our goal is to keep things straightforward and useful, no noise, just thoughtful insights to help you stay on track.

And as always, if something catches your eye or you want to talk it through, we're just a call or email away.

Janet



Janet M. Goulart, RICP®, CLTC®, LUTCF®  
Founder

## Annual Service Calendar



We are pleased to introduce a new resource for our Financial Planning clients designed to make planning and working with us even easier—our Annual Service Calendar.

Beginning this year, we will be sharing a comprehensive calendar outlining the

## Office Renovation & News

We are excited to share that, after a lengthy renovation process, our office was mostly completed late last summer, and we are now fully moved back in.

While construction is complete, we are currently working on the final touches, including landscaping and exterior painting, with plans for a new parking lot in the future. These enhancements will further elevate the space, creating a more polished, welcoming, and enjoyable environment for everyone who visits.

key planning topics and services we focus on throughout the year. The calendar is organized by season and includes helpful reminders, allowing you to better anticipate important planning activities and stay on track.

Our goal is to provide greater transparency into the many behind-the-scenes tasks and ongoing work we perform on your behalf throughout the year.

An updated version of the calendar will be shared annually with our Financial Planning clients and will also be available on our website. This is part of our ongoing commitment to improving communication and delivering a more proactive, organized experience.

We're excited to share this with you and hope you find it both useful and valuable. If you'd like to learn more about our Financial Planning services, whether as a one-time engagement or an ongoing relationship, please feel free to contact our office.

As always, we appreciate your referrals. If you know someone who may benefit from our services, we would be happy to offer them a complimentary 30-minute consultation. If we're not the right fit for their needs, we're glad to connect them with other trusted advisors.



Janet's vision has always been to create an office that feels more like a home—where you can feel relaxed, comfortable, and at ease. The updated space reflects that vision, with an improved layout and enhanced functionality, all designed to provide an inviting setting for important conversations and thoughtful planning.

Every detail was carefully considered with you in mind. We are incredibly proud of this transformation and truly happy with how it has come together. We look forward to welcoming you into the new space especially if you haven't yet had the opportunity to visit us.



## Upcoming Events

Thank you for your continued trust and support.

- ✈️ **July 2** — Janet is headed to northern Ireland with Zachary and Emily. She has promised to send us photos from their travels, so keep an eye out—we look forward to sharing a few highlights from their adventure in an upcoming newsletter.
- 📅 **July 27-29** — Janet will be attending Advisors Capital Management's annual due diligence meeting, where she'll meet with portfolio managers and hear economic updates from Dr. Charles Lieberman and Dr. Joanne Feeney. Meetings like these help ensure the strategies used in our clients' portfolios remain aligned with their long-term goals.

☀️**Summer Office Schedule:** During the summer months, our office will be **closed on Fridays in June, July, and August.** We will continue to monitor messages and will respond as soon as possible the following business day.

If you'd like guidance or support reviewing any part of your plan, we're here to help.

## Favorite Recipes to Share

### Toffee Blondies — Shared by the Lowenstein Family



#### INGREDIENTS:

- 8 tablespoons (1 stick) unsalted butter, melted
- 1 cup packed light brown sugar
- 2 large eggs
- 1 teaspoon vanilla extract
- ¼ teaspoon salt
- 1½ cups flour
- ½ cup toffee bits
- 1 cup chocolate chips

#### INSTRUCTIONS:

1. Preheat oven to 350 degrees. Spray an 8" baking pan with cooking spray and line with parchment paper. The paper should go up and overhand two of the sides.
2. Beat melted butter and sugar with an electric mixer until creamy. Beat in eggs, vanilla, and salt. With mixer in low speed, beat in flour just until combined. Stir in toffee bits and chocolate chips.
3. Spread batter evenly in prepared pan. Bake until golden and just set, about 30 minutes. Do not overbake. Cool completely in pan, then use the parchment paper to remove from pan.
4. Slice with a sharp knife.

**Great recipes are meant to be shared! If you have a favorite, send it over — we would love to feature it!**

### Contact Us

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