

Newsletter | May 2021



Team Time

Your **Shakespeare May Flowers Team** wishes you plenty of sunshine with just enough rain to keep your gardens in bloom.

Recent Blogs | [View From The Lake](#)

When Should I Start Social Security?



[Read More](#)

Will Social Security Be Around When I Need It?



[Read More](#)



Kevin's Tip of The Month: Practical and Logistical Social Security "To Dos"

1. **Create your "my Social Security Account"** at www.secure.ssa.gov to prevent the possibility of fraud. When you login to your account, you are able to:

- Review and save a copy of your Social Security Statement
- Replace your Social Security card
- Change your address
- Print proof of benefits
- Review your earnings record

2. **Review your Earnings Record.** It's important to review your earnings history, which your benefits are based on. It is not unheard of for the government to make a mistake, either omitting a given year's earnings or reporting earnings incorrectly. This is especially important if you have self-employment income.

3. **Estimate your Benefits.** If you have not yet started Social Security, you are able to get an estimate of your future benefits based on your projected retirement date and future earnings

at: <https://www.ssa.gov/benefits/retirement/estimator.html>.

4. **Apply for Benefits.** Apply for benefits in the three-month window prior to the month you would like to start your benefits. <https://www.ssa.gov/benefits/retirement/apply.html>

Market Update at a Glance

Click [here](#) for more detail.

Equity Style Snapshot			
YTD	Value	Blend	Growth
Large	14.09%	11.32%	8.87%
Mid	23.48%	18.15%	12.84%
Small	26.08%	20.25%	14.37%

Major Indices	As of 4/30/21		
	1 Month	YTD	1 Year
Russell 2000	3.26%	15.07%	74.91%
S&P 500	5.73%	11.84%	45.98%
Dow Jones Industrial Average	2.53%	11.30%	42.12%
NASDAQ	7.06%	8.55%	58.30%
Foreign Stocks (MSCI EAFE)	2.66%	6.59%	39.88%
Emerging Markets	2.25%	4.83%	48.71%
Fixed Income (US Aggregate Bond)	0.78%	-2.61%	-0.27%

We are Hiring!

We currently looking for a [Client Service Specialist](#) to join the Shakespeare Team. If you know of someone who may be interested, please forward them to this [link](#) with position information, or give us a call!

- Kevin

Up Next

Please join us for these upcoming events!

Sign Up Now!

Saturday, May 22nd - 8am

American Lung Association's **Fight for Air Climb** at American Family Field (Miller Park).

It's not too late to join our team!

Shakespeare will pay entry fees for the first 20 team members to sign up [here](#).

Reach out to Colleen@ShakespeareWM.com or 262-814-1600 for the discount code.



Saturday, June 19th - 8am

Hope Street Ministry's **Hike for Hope** at Nashotah Park.

Enjoy a beautiful hike. Hear the story of Hope Street Ministry members, ask questions and begin to see the transformative nature of a place like



Hope Street.

Family members, friends and dogs are welcome to join our team!

Please RSVP to

Colleen@ShakespeareWM.com

Thursday, July 15th 3-6pm

Shakespeare's **Blow-Out Summer Party and Shred Event** at Pewaukee Yacht Club!

- Pontoon Boat Tours of Pewaukee Lake!
- Good Food!
- Good Drinks!
- Great Friends!

Please mark your calendars now! RSVP to Colleen@ShakespeareWM.com



Out and About



Ryan and Bri's Wedding is Coming Up Soon! Here's a photo of the soon-to-be-newlyweds at Bri's Bridal Shower.



Andrea's daughter **Clare**, on her University of Minnesota Admitted Nursing Student College Tour. Congratulations to Clare. We are beyond excited for her! She's going to be one FANTASTIC nurse!



Andrea and her kids at her own College Apartment 221A at the U.



Colleen said this guy at the Milwaukee County Zoo was wondering when you were going to visit him and his friends!

Health, Wealth & Happiness

Health, happiness and wealth depend on each other. To reach your goals of a happy retirement, do not overlook the value of a healthy retirement. More than 80% of today's retirees say health is the most important ingredient for a happy retirement (valuing good health even over financial security).

May's Tip for a Happy Retirement - May is Older Americans Month (not that any of us are older)

There is a lot to celebrate in May. Along with May flowers, of course, there is Mother's Day, Cinco de Mayo, Memorial Day, The Kentucky Derby and, this year, vaccinations for Covid 19.

To help celebrate May is Older Americans Month, the [Healthy Aging® website](#) will be featuring articles of people who have reinvented themselves along with tips for physical, social, mental and financial wellness throughout the month.

They've done a great job, so we are simply going to point you to it. [Click Here!](#)

If you enjoyed our newsletter, don't keep it a secret! Share it below:



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Until Next Time!





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