

## 1<sup>st</sup> & 10 - Blockbuster Trojans

June 23, 2026



Summer blockbusters are back baby! From horror films with \$750k budgets making hundreds of millions (you can Google it) to “Michael”, “Toy Story 5”, the latest iteration of “Spiderman” and Christopher Nolan’s “The Odyssey”, it feels like a normal Hollywood summer from the past 40 years. The pandemic (and labor strike) set the industry back a few years, but let’s hope this is the start of a new trend. Go see a movie in the theater!

Speaking of Trojans, while you watch Odysseus’ life unfold on the big screen after his conquest of Troy, modern day Trojans are feeling less defeated. In fact, this optimistic USC alumnus is cautiously looking towards the 2026 college football season, where annual hope springs eternal in roughly 67 days. Markets also remain hopeful, and for good reason...

1. The Iran war has ended...maybe. [Only President Trump seems happy with the outcome.](#) I do hope the ceasefire holds and we can get back to “normal.”
2. [Stock market hiccups are normal...corrections are normal too.](#) Try to take a long view of investing. If you feel you lose too much during these normal cycles, it’s time to re-assess your risk tolerance and investment strategy.
3. Did you buy the SpaceX IPO? No? [Congratulations](#), but you may want to jump in at some point. When? Your guess is as good as mine.
4. Do you own ALL stocks in your portfolio? Probably not. [But most people focus solely on their stock portfolio and ignore the rest.](#) Well, ignoring the rest is costing you big time. Owning traditional bonds, the AGG, target date portfolios, and “Balanced” funds in 401k plans is dragging down your portfolio performance...AND YOU DON’T EVEN KNOW IT.
5. You have heard me mention **Structured Notes** in previous comments. We even had a webinar a few months ago where we took a closer look. If you want to know more, and are interested in exploring how they can help your [bond portfolio/allocation](#), let me know.
6. Financing real estate or other large assets and investment properties can be a challenge. [Traditional ideas are fine](#), but it’s ok to get creative. Like what?...ask us about:
  - Securities based lending
  - Fractional ownership
  - Crowdfund lending
  - LLC leveraged asset lending
  - 1031 exchanges
7. Estate planning is a chore, but it is one area your beneficiaries will appreciate your forethought and effort. Do you have LPOA for your single, adult children? How is your estate avoiding probate? Are there assets available to pay estate taxes? Are your beneficiaries up

to date? Do your loved ones have a plan for managing your family estate when you are gone? How about an income strategy for a surviving spouse?

8. Speaking of giving, [did you know lifetime giving is much more satisfying](#) to the giver and recipient than leaving a lump sum at the end? But you need a strategy and a plan on not just charitable giving and managing the taxes, but on how to make sure you don't give too much and still maintain your lifestyle. Seeing the joy of wealth supporting your loved ones is the generational impact and legacy all of us want to have.
9. It is a weird reality for me without the demands of summer football, but it reminds me that seasons are just that. We do some things for a season, and when it is over, it is ok to take a break, rest, reset and prepare for what's next. God made four seasons for us to enjoy, and we all have work, family and service seasons too. Embrace the rhythm and continue to grow in whatever season of life you find yourself!
10. Where are you traveling to this summer? Kim and I just returned from Hilton Head, SC. I highly recommend a visit if you haven't been - just use caution when kayaking in strong winds and try to avoid the gators in the marinas.

God bless,

Josh