



## PASCOLO VERDE Q1 2026 NEWSLETTER

Hi Pascolo Private Wealth Management Family,

Welcome to our very first edition of the **Pascolo Verde** Newsletter. Pascolo is an Italian word that means “Pastures” and Verde means “Green” with the proper translation of “Green Pastures”. The goal of this newsletter is to update clients with important news, market updates, expert insights, and the latest financial trends to help you make informed decisions. It is my goal to bring a peaceful and confident experience as we navigate our wealth building process in the asset management (paper asset) world as we establish and grow our legacies.

These newsletters will be disseminated quarterly on a regular basis, with additional newsletters sporadically as the changing financial environment may dictate.

We hope and pray that you had blessed Holiday Season and Happy New Year and look forward to a great 2026.

### **COMMUNICATION:**

The new Pascolo Private Wealth Management website is now live. You can reach this site at [www.PascoloWealth.com](http://www.PascoloWealth.com)

Here you will find, all contact information including the phone number for calling and texting, email with link, and the Calendly link for scheduling zoom or phone appointments. Please know that the Calendly scheduling link does not reflect my total availability and is limited to Tuesdays and Thursdays as are my automatic appointment days. If you don't see a day or time that works for you using the link, please reach out via text or email with some days and times that work for you and I will open up a time that works for both of us. If need be, I can accommodate appointments on evenings and weekends especially for urgent matters.

As a reminder, please keep my phone number 913-308-8355 and my email [Joshua@Pascolo271.com](mailto:Joshua@Pascolo271.com) in a separate business contact on your device. You may keep my personal cell number, 248-943-7109 in a separate personal contact as I may be calling from this number or have you call this number to connect from time to time. The (913) number is connected to an approved application that allows for texting in compliance with the financial industry and comes directly to my phone and computer so that I can receive and correspond quickly to all clients. The information texted to, and from this number are recorded in your client file as correspondence and the (913) may be used and monitored by current and future members of my team as needed. Please do not text my personal (248) number with any business related or financial sensitive information.

The website will also contain a resource page to access these newsletters and other forms of media and resources disseminated for your use.



## **NEW TEAM MEMBERS:**

### **Jennifer Novak:**

I recently hired a new CRM (Client Relationship Manager) named Jennifer (Jenn) Novak. In the coming months I hope to meet with every client for a review update and to introduce you to Jenn and explain her role and how she can assist you with various client needs like withdrawals and deposits, paper work, and other client related tasks. Jenn can be reached directly at the email: [Info@Pascolo271.com](mailto:Info@Pascolo271.com) and she will also be monitoring the (913)308-8355 business number as needed.



## **NEW PARTNER(S):**



### **Lorrie Jobe:**

I have also recently partnered with a new CPA firm and CPA expert Lorrie Jobe.

Lorrie is a high-level expert in the field of taxation with experience as a professor of graduate level taxation classes at Texas Tech University and she also served many years as a Tax Manager for various government entities in Washington, D.C. including Freddie Mac. She recently merged her practice with an accounting firm in Plano, TX where she serves as Tax Director and Practice Lead. Lorrie and I met last fall at the annual WWG (Wealth with God) Big Event in Austin, TX where we discovered a great common goal of providing world-class professional services with a Kingdom-minded approach. I have recorded one of two meetings with Lorrie that I intend to provide as an additional resource on the [www.PascoloWealth.com](http://www.PascoloWealth.com) resource page soon.

There are currently 2 resources that she helped provide that are already available on the website today. The documents include a Protect & Prevent: Creating an IRA ID ME Account guide and a Protect & Prevent IRS Identity Protection PIN (IP PIN) guide. The video coming shortly will help explain the purpose and use of these guides.

## **MARKET UPDATE:**

As of the writing of this portion of the newsletter (01/29/2026), the TAA (Tactical Asset Allocation) model portfolio that many clients are utilizing has had a great start to the new year thanks to our position in Gold (PHYS) growing over 23% since January 1<sup>st</sup>. We also have 2 international positions in the nations of Japan (EWJ) and Israel (ISRA) that have also gained over 6% each here in the first month while the NASDAQ and S&P 500 (US Markets) are hovering just under 2% year to date. The momentum of the TAA portfolio going into the month of February looks to be eliminating all exposure to the NASDAQ and S&P 500 ETF's (QQQM and SPY) in favor of other international positions (SCZ and IEMG).

While the future of the stock markets is always unknowable, we will continue to approach our TAA portfolios with an active market risk management approach. One of the biggest concerns in the market today is the erosion of the US Dollar. This is a primary reason for the increase in value of precious metals as they are generally a hedge against inflation and a fear gauge when traders are concerned about the growth of the economy. This is also a reason the portfolio will be reallocating to more international exposure while maintaining our position in gold into the next month. As

always, please reach out for a personal portfolio review or other financial matter that I can assist with.

I am so grateful for all of you that followed me to my new home at Lex Aurum Advisors and for the new clients that have recently joined me since my move on October 1<sup>st</sup> of 2025. LexAurum is a registered investment advisory firm that allows independent advisors, like me, to own and operate their own advisory practice under the guidance and support of an exceptional team. LexAurum is Latin for “Golden Rule” and you are welcome to learn more about them and the team that supports me at [www.Lex-Aurum.com](http://www.Lex-Aurum.com). LexAurum primarily supports advisors with legal, regulatory, and compliance items, provides all accounting and billing needs, and has a great administrative support team to assist with research, trading, and technical support with many of our applications.

Thank you,

A handwritten signature in blue ink, appearing to read 'J D Paletta', with a stylized flourish at the end.

Joshua D. Paletta

\*Data provided in Market Update is from Yahoo Finance as of 01/29/2026

\*Information provided for the TAA portfolio is from Allocate Smartly as of 01/30/2026

**Important Disclosures:** Investment Advisory Services offered through LexAurum Advisors, LLC, an independent investment advisory firm. LexAurum Advisors LLC and Pascolo Wealth are not affiliated companies. This report is being provided for your convenience and for informational purposes only to provide you with data about market performance. Although the information has been gathered from sources believed to be reliable, we do not guarantee its accuracy or completeness. Information may become out of date and/or unreliable over time. Always do your own research and consult your own professionals before acting. Performance data quoted represents past performance and does not guarantee future results. An index is a portfolio of specific securities (such as the S&P 500, Dow Jones Industrial Average and Nasdaq composite), the performance of which is often used as a benchmark in judging the relative performance of certain asset classes. Indexed are unmanaged portfolios and investors cannot invest directly in an index. Investing strategies, such as asset allocation, diversification, or rebalancing, do not ensure better performance and cannot eliminate the risk of investment losses. All investments have inherent risks, including loss of principal. There are no guarantees that a portfolio employing these or any other strategy will outperform a portfolio that does not engage in such strategies. For information about personal investment returns, rely only on statements generated by the custodian.