

# Nova News

PREDICTABLE. SUSTAINABLE. INCOME.



## Client Spotlight: Ann & Jerry's Mountain Getaway

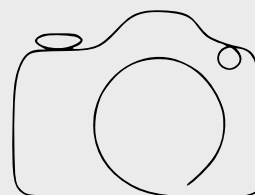


We love seeing our clients living well—and taking a little Nova with them along the way!

This month, we're spotlighting Ann & Jerry, who recently returned to one of their favorite retreats: Mohonk Mountain House in New Paltz, NY. Their trip included golf (with bell ringing, of course), scenic hikes through the "Lemon Squeeze," spa indulgence, and wine on the balcony—all with a Nova glass in hand.

Ann is embracing retirement to the fullest, and Jerry's not far behind. We're so grateful to be part of their journey.

Have your own "Nova in the Wild" moment?  
Send us a photo and tell us where you've been—we'd love to feature you next!



## 🌸 April Highlights: Conversion Strategies & Coaching on the Green

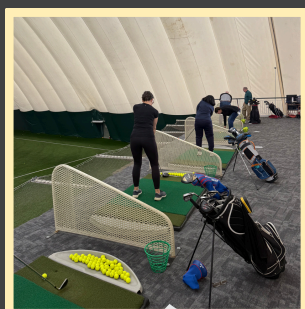
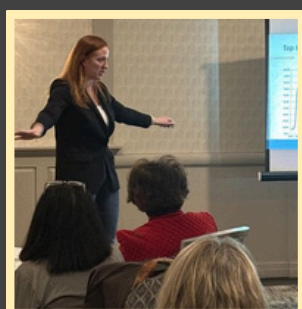
April was a month of learning and connection at Nova Wealth, with two standout events designed to educate and engage our clients.

### 💡 Savvy IRA Planning Seminar

We kicked off the month with our Savvy IRA Planning Seminar, where we unpacked how Roth conversions can be a powerful part of your long-term retirement strategy. From managing future tax exposure to creating flexibility in retirement income, we discussed when a Roth conversion might make sense—and how it can support your goal of predictable, sustainable income. Clients walked away with actionable insights and a clearer path forward.

### 🏌️ Golf Clinic with Allen & Cindy Miller

Later in the month, we brought clients together for a hands-on golf clinic at the Paddock Dome, led by PGA and LPGA pros Allen and Cindy Miller. Allen, a former PGA Tour champion, and Cindy, an LPGA Hall of Fame inductee, brought energy, humor, and expert instruction to the day. Whether our guests were seasoned golfers or swinging a club for the first time in years, everyone left with a few new skills and a smile. It was a perfect reminder that financial fitness and physical wellness go hand in hand.





# Upcoming Events



**Save the Date: Special Guest Presentation  
June 17<sup>th</sup> - 5:30PM, Salvatore's Italian Gardens**

We welcome U.S. Navy SEAL  
Combat Veteran Phillip  
Koontz for an unforgettable  
presentation on leadership,  
resilience, and overcoming  
adversity. You won't want to  
miss this powerful evening  
of inspiration and  
perspective.



**Annual Shred Event - Wednesday, June 18<sup>th</sup>**  
More details to come!

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