


SPOTLIGHT

ASSET GROUP

Illuminate Your Options

Spotlight On Your Wealth Podcast (...)

 <https://spotlightassetgroup.podbean.com/feed.xml>
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Episode #6: Mental Health
and Wealth
([https://spotlightassetgroup.podbean.c](https://spotlightassetgroup.podbean.com/feed.xml)
[6-mental-health-and-](https://spotlightassetgroup.podbean.com/feed.xml)
[wealth/](https://spotlightassetgroup.podbean.com/feed.xml))

May 21, 2019

May is Mental Health Awareness Month and on this podcast we discuss mental health and money. Our special guest is Jacob Moore, Founder and CEO of No Stigmas, a non-profit organization whose mission is to ensure no one faces mental health challenges alone. Jake tells us about his personal journey, shares his insights on mental health and wealth, and gives advice on how to help family and friends dealing with mental health challenges.

*Resources mentioned in this
podcast*

KnowBrainer

Campaign: www.nostigmas.us
(<http://www.nostigmas.us>) or text
31996, keyword nobrainer

No Stigmas: www.nostigmas.org
(<http://www.nostigmas.org>) or

@nostigmas

Jacob Moore:

www.jacobmoore.com

(<http://www.jacobmoore.com>) or
@jacobmoore on Instagram
Suicide Prevention Lifeline: 1-800-
273-TALK (8255) or text HOME to
741741

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Episode
#5: How
We
Choose
Investments
and Our
Investment
Philosophy

Episode #5: How We
Choose Investments and
Our Investment Philosophy
([https://spotlightassetgroup.podbean.c
5-how-we-choose-
investments-and-our-
investment-philosophy/](https://spotlightassetgroup.podbean.com/episode/5-how-we-choose-investments-and-our-investment-philosophy/))

April 23, 2019

With thousands of investment
options, how do we put together
investment portfolios and what is our
investment philosophy? Stephen
Greco, CEO of Spotlight Asset
Group, joins us on Episode #5 of the
Spotlight On Your Wealth Podcast.

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(https://www.podbean.com/site/r

Investing

Welcome to the Spotlight On Your Wealth Podcast where we explore all aspects of your financial life, brought to you by Spotlight Asset Group, a wealth management firm dedicated to Transparency, Technology, and Total Wealth.

Pages

Transcripts

(https://spotlightassetgroup.podbean.com/transcripts-1536074196/)



Episode

#4:

What Is
a Stock,
What is
a Bond,
What is
a Fund?

Episode #4: What Is a
Stock, What is a Bond,
What is a Fund?
(https://spotlightassetgroup.podbean.c
4-what-is-a-stock-what-is-a-
bond-what-is-a-fund-with-
jon-jamieson/)

March 8, 2019

Jon Jamieson, Director of Trading at Spotlight Asset Group, explains what is a stock, what is a bond, and what is a fund in this episode of the Spotlight On Your Wealth Podcast.

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Episode

#3: How
Will the
New Tax
Code
Affect
You?

Episode #3: How Will the
New Tax Code Affect You?
(https://spotlightassetgroup.podbean.c
will-the-new-tax-code-affect-
you/)

November 27, 2018

In 2017 Congress passed the most sweeping update to the tax code in 30 years. How will the new tax code

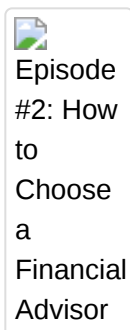
affect you? Our guest on Episode #3 is Kermith Boffill, a lead tax partner and CPA at Grobstein Teeple, an accounting firm with offices in California and Washington DC.

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Episode #2: How to Choose a Financial Advisor

(<https://spotlightassetgroup.podbean.com/episode/2-how-to-choose-a-financial-advisor/>)

October 2, 2018

Our guest is Jason Howard, General Counsel and Chief Compliance Officer for Spotlight Asset Group. If you, your family, or your friends are looking for an adviser or are already working with one, Jason gives important advice applicable to any client.

Resources referenced in this show:

- FINRA Broker Check website:
<https://brokercheck.finra.org/>
(<https://brokercheck.finra.org/>)
- United States Securities and Exchange Commission (SEC) Investment Adviser Public Disclosure website:
<https://www.adviserinfo.sec.gov/>
(<https://www.adviserinfo.sec.gov/IAPD/Default>)

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Episode
#1: The
Spotlight
Story
with
Stephen
Greco

Episode #1: The Spotlight
Story with Stephen Greco
(<https://spotlightassetgroup.podbean.com/episode/1-the-spotlight-story-with-stephen-greco/>)

August 31, 2018

DESCRIPTION

Our guest is Stephen Greco, Founder and CEO of Spotlight Asset Group. On this episode Steve discusses why he started the firm, what it stands for, and where the firm is heading in the future. Steve explains how Spotlight's belief in Transparency, Technology and Total Wealth are impacting the lives of investors.

CLICK HERE FOR THE FULL
TRANSCRIPT

(<https://spotlightassetgroup.podbean.com/p/transcript/1536074196/>)

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