



## WHAT WE CAN DO

*Faith is taking the first step, even when you cannot see the whole staircase.*

- The Rev. Martin Luther King, Jr.

Stepping into the unknown – making a leap of faith – is something few of us like to do but is a reality of life and part of nearly every relationship we have. Faith is likely familiar to all of us in some form: faith in the future, faith in a partner or friend, faith in your own abilities, or faith in something – or some being - greater than ourselves.

The concept of faith bridges both the unknown and the familiar. Rarely random or completely unfounded, faith still often requires a final jump that can give us pause no matter the history involved. That is, after all, what makes it *faith* and not *fact*.

There is no precedent, at least not in modern times, for what is happening in the early days of 2020. Beyond the enormous human toll, the abrupt cessation of significant chunks of economic activity, not to mention daily life, has not occurred in living memory. There are few if any historical examples to provide context. While we are clearly not at the end of this Crisis, we are probably at the end of the beginning.

I believe the best we can do is to maintain a sense of perspective. As a society, we have faced far worse: civil war, a global multi-year depression and two devastating world wars. We will get through together.

In the meantime, we are still here for you. Hallett Advisors remains fully operational, available and ready to be of service to you and to those you know who are seeking the counsel of a trusted advisor. As we all adapt to these circumstances, we can help you with account access, review meetings and connections with you. See the attached information on the various tools to help keep you informed and engaged with your account and financial plan.

We are ready to help you take the next step. Have faith.

## **Portfolio Management Services**

Through the use of electronic signatures, we are able to accomplish the vast majority of our clients operational needs including opening and transferring accounts, linking bank accounts, and making online contributions and withdrawals. Some of these tasks can be completed through online access as well. Below are links to gain online access:

- If you have accounts at SEI Trust Company, you can set up online account access here:

[www.accessmyportfolio.com](http://www.accessmyportfolio.com)

- If you have accounts at Charles Schwab, you can set up online account access here:

[www.schwaballiance.com](http://www.schwaballiance.com)

## **Review Meetings and Financial Plan Updates**

We are still holding **client meetings**. We use the Cisco Webex conferencing program to communicate (audio or video) and share documents during the meeting.

## **Secure Document Transfer**

We can securely send and receive sensitive documents (we will send you instructions when necessary).

## **Phone & Voicemail**

We have full access to our phone system from home, so we attempt to answer all calls during business hours. If we miss your call, feel free to leave a message and we will provide a timely response.

## **Mail**

We are not completely virtual! We still check the mail and perform tasks in the office when necessary.

We are striving to provide the advice and support you deserve as our clients. Please let us know if you have any needs or concerns. While we look forward to resuming in-person meetings in the future, these online tools allow us to remain fully operational during this time.