

## Your Financial Journey

Helping You Make Better Financial Decisions

### Affected by DOGE?

If you or someone you know is losing their job due to **DOGE**, we are here to help. The advisors at Potomac Financial have decades of experience helping federal workers (civilian and military) navigate the road to retirement – we know how hard you work, and how much your service means to our country.

Retiring earlier than you planned, or being subject to a RIF, can be extremely stressful and raise a lot of questions. We can help you make better decisions about spousal benefits, insurance and your TSP.

If you want to update your financial plan, or you know someone who needs to talk to a financial advisor, please contact us: [info@potomacfinancialpcg.com](mailto:info@potomacfinancialpcg.com).

### Ryan Sullivan Promoted to Advisor



Please join us in congratulating **Ryan "Sully" Sullivan** on his promotion to Advisor! Ryan joined Potomac Financial in 2019, and immediately showed the deep commitment to our clients we all share. Holding the CFP® certification and various industry licenses, Ryan specializes in investment planning, retirement planning, risk management, and estate planning. He is passionate about building strong, personal relationships with clients and making a meaningful impact on their financial journeys. Ryan's dedication extends beyond the office, where he volunteers as an EMT with the Fairfax County Fire and Rescue Department. We are excited for Ryan as he steps into this new role and look forward to the continued positive impact he will have on our clients' financial futures.

### Webinar: The New Retirement Rules: Understanding SECURE Act 2.0



Join Steve Richardson, Principal and Senior Advisor and Kyle Morrissey, Advisor for a break-down of SECURE Act 2.0 - the most significant retirement legislation since 2019, with roughly 100 provisions affecting retirement plans. Steve and Kyle will outline the key changes, from extended saving opportunities to new ways to use retirement funds, and help you understand their impact. We'll explore how these changes affect different generations, from Boomers to Millennials, and why now is the time to reevaluate your financial and retirement strategies.

**To pre-register or to join the webinar, simply click on link below on Wednesday, March 26th, 2025 at 12:00 pm ET:**

Register or Join Webinar

# An Evening at Wolf Trap



We'd like to remind you of our special tradition each summer — our **Referrer's Appreciation Event at Wolf Trap!** This event is a wonderful opportunity to enjoy dinner and a show with us as a way to say thank you to those who have referred friends, family, or colleagues to our firm. Anyone who introduces us to a prospective client throughout the year, whether you're a current client or a

friend, will receive an invitation to this exclusive event. It's our way of showing our appreciation for your continued support and trust. We will be announcing this summer's concert very soon, so if you have been meaning to introduce a friend to the firm, there is no time to waste!

## Microsoft Teams

We are in the process of changing our virtual meeting platform from Zoom to **Teams** for both client meetings and webinars. To join a **Teams** meeting or webinar just select "**Click here to join the meeting**" or the link provided. Questions? Click below or give us a call.

[Teams How-Tos](#)



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Connect with us

[info@PotomacFinancialPCG.com](mailto:info@PotomacFinancialPCG.com)



Potomac Financial Private Client Group | 11130 Sunrise Valley Drive, Suite 130, Reston, VA 20191  
703-891-9960

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