Service Clubs Announcements



Zoom Meetings Every Friday at 7:00 a.m. - 8:15 a.m. https://us02web.zoom.us/j/82609498205

AUGUST WEEKLY MEETINGS

7: Dr. Michale Yassa, Perfect Memory

14: Ana Lukner Rolji, Rotary in Slovenia 21: Dr. Linda Halderman, COVID-19 Update

28: Claire Roberts, Member Magazine

www.lamorindasunrise.com

Please submit:

Events: calendar@lamorindaweekly.com Stories: storydesk@lamorindaweekly.com Letters: letters@lamorindaweekly.com

Lynn's Top Five

Thoughts for managing your investment portfolio during a global pandemic

... continued from Page B2

Most investors will buy a similar position as a placeholder as soon as that sale occurs so as not to "miss out" if the markets appreciate during the 30 days they are prohibited from repurchasing that sold asset. While this is often a very helpful income tax management tool, there might also be potential portfolio and performance disruption. Navigate this issue by choosing your replacement holding wisely. Also understand that sometimes selling your "placeholder" investment to return to your previously owned position might generate short-term capital gains. Do the math to be sure it's worth it! 5. Review your holdings and

your objectives regularly, not obsessively. We are all missing competitive sports but this is not the time to turn to day trading for some action and adrenaline! Unless you have

money you can afford to lose, design a portfolio that helps you score your successes as they relate to your real life goals in the long-run and not just churn for fun or sport as a substitute for short-term entertainment. Limiting your thoughtful portfolio and investment holding reviews to be no more frequently than quarterly can keep you from making emotional versus logical deci-

Bottom line, while it's very important to be informed and stay informed, don't obsess and don't take action just for action's sake. Periodically research, review, discuss with your trusted advisors and implement thoughtful changes, but only as appropriate. And then disconnect and go for a walk in these beautiful hills and on these amazing trails we are so fortunate to enjoy in our community. Stay safe, everyone!



Lynn Ballou is a CERTIFIED FINANCIAL PLANNER TO professional and Regional Director with EP Wealth Advisors, a Registered Investment Advisory Firm in Lafayette. Information used in the writing of this column is believed to be factual and up-to-date, however, we do not guarantee its accuracy. This column does not involve the rendering of personalized investment advice and is not intended to supplement individualized professional advice. A financial, tax and/or legal professional should be consulted before implementing any of the strategies directly or indirectly suggested and discussed. All investment strategies have the potential for profit or loss.

Opinion: letters@lamorindaweekly.com

Lamorinda's Religious Services

Worship services are available online to view or stream or they have been canceled for now. Please call or check the individual websites for updated information.



Lafayette United Methodist Church

Go to to our YouTube Channel: Love LUMC

for small-batch, home-grown, curated worship playlists and more inspiration

WILLOWSPR, NG community church

All expressions of opinion reflect the judgment of the author and are subject to change.

Content does not involve the rendering of personalized investment advice and should not

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consult an attorney or tax professional regarding your specific tax or legal situation.

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Online Service Only 10:45 AM

ST MARK'S CHURCH

OF ORINDA & MORAGA

Sunday Service at 10 a.m.

451 Moraga Way, Orinda

www.stmarksorinda.org | (925) 254-5965

All Are Welcome

We're all in this Join us for worship online

Sundays at 9 a.m. or any time you wish!

Lafayette-Orinda Presbyterian Church 49 Knox Drive • Lafayette, CA • (925) 283-8722

Holy Shepherd Lutheran Church

www.holyshepherd.org ONLINE WORSHIP SCHEDULE Facebook Premiere Community Worship every Sunday at 9:30 a.m. Go to

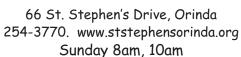
433 Moraga Way, Orinda, 254-3422



Sunday Worship Services are accessible at our website at about 10:15 a.m. each Sunday (after they have premiered on Facebook). Visit our website to access the current and recent sermons.

facebook.com/HSLCOrinda/

St Stephen's Episcopal Church



ORINDA CHRISTIAN SCIENCE CHURCH All are welcome to our on-line services

Mt.Diablo Unitarian Universalist Church | www.MDUUC.org

Sunday Service 10 - 11 am Informal Wednesday Meeting 7:30 - 8:30 pm See website and join us through Zoom www.christianscienceorinda.org

St. Anselm's Episcopal Church

An Open, Affirming & Loving Community Virtual service at Sun. 9:00 AM (at least through May 10th) If someone would like to be added to our Zoom invitation please call 925-284-7420 or email cathy.w@stanselms.ws 682 Michael Lane, Lafayette, www.stanselms.ws

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