

Something, somehow, somewhere ...

There are those days when it is better not getting out of bed...on either side. I spoke with a friend, he said that they are getting along but that the days are blending one into another in a mélange. He and his wife, like most of us, are socially isolating. While the coasts are a COVID-19 mess, the center of the fruited plane is better and trying to open up. What about you? Are you ready to party like it's 1999? Or more like Robinson Caruso waiting for a ship to come in to break the isolation?

Truly, this is surreal. Some think it is apocalyptic but the Marines say it best; "Engage - Adapt - Overcome". I hope I can do the latter. I say this because, though I have been in the profession since 1993 and in financial services since 1982, this is not a slow-down, it's a new beginning. IT IS NOT A REDO, it is "...now for something completely different".

The stock market is a mirror of those who are in it. Fear, greed, anxiety, profit, joy; all human emotions are there in your face. For example, the S & P PE, price earnings, is higher than its historic average of 15 by 5 points. This suggests a market that is expensive in the midst of COVID-19 bear market. I offer another point of view; "fail to plan, plan to fail". By planning and following your plan, somehow you will make it; you will make the ship come in because you built it.

"Toto, this is not Kansas anymore." The lore around that movie is deep and fascinating. Like then, this is a time of a hurricane. We need our friends, allies and good mentors for guidance and direction. If you are feeling abandoned by your money people, perhaps something completely different is needed. Somewhere there is an ally who can point you in the right direction. Somewhere there is a friend who can hold your hand without putting you out. Somewhere you can discover the yellow brick road, if not back to Kansas, then find the salutary process and plan to overcome the separation we are all seeing, noticing and realizing.