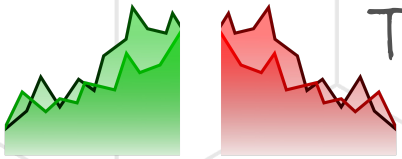
TIME WELL $PENT

WHAT TEACHING KIDS ABOUT MONEY TAUGHT ME!





By: Brian Brummett, CFP®| Portfolio Manager

A few years ago, I was asked to speak to a classroom full of students as part of Leadership Kingsport. No script, no warning—just me, a room full of kids, and a subject I knew like the back of my hand: finance. I figured I'd do my best and hope not to bore them.

IT TURNED OUT TO BE ONE OF THE MOST ENERGIZING PROFESSIONAL EXPERIENCES I'VE HAD.

To my surprise, the kids were fascinated. They were sponges, soaking up everything from compound interest to opportunity cost. And more importantly—they cared. Since that day, I've continued speaking to youth through organizations like Kiwanis, the Boys and Girls Club, Girls Inc., and even one-on-one with the children of clients and friends. Each time, the enthusiasm has been the same.

But the part that's stayed with me most? The moment when I ask kids what they'd do once they had "enough money." The answers don't focus on cars or mansions. Overwhelmingly, they say they want to make the world—or at least their community—a better place. They want to help others, start nonprofits and support causes they care about. That idealism, rooted in financial literacy, is something we could all take a cue from.

I've noticed that children often ask some of the most insightful questions. Their curiosity and open-mindedness allow them to grasp complex concepts without the same assumptions or barriers that can come with age. When I explain topics like inflation, investing, or budgeting in simple terms, they truly understand. Many of them continue the conversation long after, reaching out with updates, questions, and even sharing their financial successes. It's one of the most rewarding aspects of my career.

I'm no substitute for a full-time teacher, and I wouldn't pretend to be. But if I can spark an interest in a kid—make money and economics feel empowering instead of intimidating—then I've done something worthwhile. Whether they become entrepreneurs, artists, engineers, or anything else, understanding how money works will help them get where they want to go.

AND MAYBE, IF WE'RE LUCKY, THEY'LL USE WHAT THEY LEARN TO BUILD A WORLD THAT REFLECTS THE BEST OF THEIR VALUES.

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UPCOMING EVENTS

COOKING SOMETHING UP FOR JUNE!

STAY TUNED FOR MORE DETAILS



DID YOU KNOW?

THE 1-KUNA COIN IS ONE OF THE SMALLEST TO EVER EXIST

THE GUINNESS WORLD RECORDS ORGANIZATION RECOGNIZES THE 1-KUNA COIN AS THE SMALLEST IN THE WORLD. THE COIN HAS A DIAMETER OF 1.99 MM AND ONLY WEIGHS 0.05 GRAMS. THE COIN HAD BEEN CREATED TO CELEBRATE THE KUNA ONE LAST TIME BEFORE CROATIA SWITCHED TO THE EURO.



THE AFI IMPACT



2025 ALTS FORUM | ALTERNATIVE INVESTMENT COMPLIANCE EDUCATION & DUE DILIGENCE

The Pinnacle Semi-Annual Alts Forum offers RIAs practical education, peer collaboration, and access to top-tier alternative investment managers. They learn best practices for onboarding, compliance, and billing. It's also a chance for them to connect with like-minded advisors to explore real-world strategies for incorporating alternatives into client portfolios. Huge thank you to Kaylee for attending and representing our firm in Atlanta this year!



JOSH EMCEE'S 5TH ANNUAL PETWORKS FURBALL GALA | "ALL JAZZED UP FOR PETS" IN 2025

On Saturday, April 5th, 2025, the "All Jazzed Up" Petworks 2025 Fur Ball was held at the Meadowview Marriott Conference Resort & Convention Center. The event embraced the lively energy and soulful rhythms of jazz while reflecting the joy, resilience, and community that drive Petworks mission. While many of you could not join us in person, the success of the evening was made possible by the ongoing support of people like you. Your continued commitment helps shelter, care for, and re-home adoptable animals in need.



PEAK - KINGSPORT YOUNG PROFESSIONALS HELP THE EASTER BUNNY WITH "EGG MY YARD"

PEAK had a great time for "*Egg My Yard*" this year! Kaylee and fellow members loved helping out the Easter Bunny with hiding eggs for select families. We hope all of the kiddos loved their surprises the next morning!

As a leadership program within the Kingsport Chamber Foundation, the focus of PEAK is to pursue, prepare, and promote Kingsport's young professionals. The members of PEAK create a group of Professionals Engaged in Advancing Kingsport.



WELCOME DARRELL & SHARON DUNCAN | CAITLYN DUNCAN MEMORIAL SCHOLARSHIP

Join us in honoring Caitlyn's legacy. In this heartfelt and powerful episode, we're joined by Darrell and Sharon Duncan> They share the story of their daughter Caitlyn, whose life was tragically cut short at just 17 years old. Through this incredibly tragic loss, they've built a legacy in Caitlyn's honor that continues to inspire and impact young lives.

We talk about the Caitlyn Duncan Memorial Scholarship, and the Duncan's meaningful partnerships with the Dobyns-Bennett High School Marching Band and Intercity Ballet — two organizations that were deeply connected to Caitlyn's passions. This episode is a touching reminder of the strength found in love, community, and purpose. Don't miss it.

Got A Story to Tell?

By sharing diverse stories, we aim to paint a realistic picture of life after work. Retirement is a unique experience for everyone, filled with both highs and lows. Through the voices of those who have lived it, we hope to provide inspiration, guidance, and a sense of community to others on the same path. Do you have a story to tell? Email connect@afiadvisors.com to get the conversation started.





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