

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
 Opinion: 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 decisions.

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!

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 be construed as a recommendation or solicitation to buy or sell a particular security. Tax information is general in nature and should not be construed as legal or tax advice. Always consult an attorney or tax professional regarding your specific tax or legal situation.



Lynn Ballou is a CERTIFIED FINANCIAL PLANNER™ 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.

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



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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
 TOGETHER!*
 Join us for worship online
LOPC.ORG
*Sundays at 9 a.m.
 or any time you wish!*

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

JUST LOVE.
IMMIGRANT | LGBTQ
OF COLOR | WITH DISABILITIES
OF ALL AND ANY FAITHS
BLACK LIVES MATTER
 Mt. Diablo Unitarian Universalist Church | www.MDUUC.org



St Stephen's Episcopal Church

66 St. Stephen's Drive, Orinda
 254-3770. www.ststephensorinda.org
 Sunday 8am, 10am

Holy Shepherd Lutheran Church 433 Moraga Way, Orinda, 254-3422 www.holyshepherd.org

ONLINE WORSHIP SCHEDULE
 Facebook Premiere Community Worship
 every Sunday at 9:30 a.m. Go to
facebook.com/HSLCOrinda/



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.

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

ORINDA CHRISTIAN SCIENCE CHURCH

All are welcome to our on-line services

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



OUR SAVIOR'S
 LUTHERAN CHURCH
 TRANSFORMED BY THE PATH WE WALK TOGETHER

Join us at OSLC.NET
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 or any time on our YouTube Channel

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Contact us:

Letters to the editor (max 350
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letters@lamorindaweekly.com

Delivery issues:

homedelivery@lamorindaweekly.com

Event listings: calendar@lamorindaweekly.com

Business press releases:

storydesk@lamorindaweekly.com

General interest

stories/Community Service:

storydesk@lamorindaweekly.com

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storydesk@lamorindaweekly.com

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sportsdesk@lamorindaweekly.com

Publishers/Owners: Andy and

Wendy Scheck;

andy@lamorindaweekly.com,

wendy@lamorindaweekly.com

Editor: Jennifer Wake;

jennifer@lamorindaweekly.com

Sports Editor: sportsdesk@lamorindaweekly.com

Advertising: 925-377-0977,

Wendy Scheck;

wendy@lamorindaweekly.com

Staff Writers:

Vera Kochan;

vera@lamorindaweekly.com,

Pippa Fisher;

pippa@lamorindaweekly.com,

Nick Marnell;

nick@lamorindaweekly.com,

Sora O'Doherty;

Sora@lamorindaweekly.com,

Jon Kingdon; sportsdesk@lamorindaweekly.com

Digging Deep; Cynthia Brian;

Cynthia@GoddessGardener.com

Food: Susie Iventosch;

suziventosch@gmail.com

Contributing Writers:

Conrad Bassett, Sophie

Braccini, Diane Claytor,

Michele Duffy, Fran Miller,

Jenn Freedman, Mona Miller,

Kara Navolio, Moya Stone,

Margie Ryerson, Linda

Fodrini-Johnson

Calendar Editor: Jaya Griggs;

calendar@lamorindaweekly.com

Photos: Tod Fierner, Gint

Federas

Layout/Graphics:

Andy Scheck. Printed in CA.

Mailing address:

Lamorinda Weekly, P.O. Box

6133, Moraga, CA 94570-6133

Phone: 925-377-0977;

Fax: 925-263-9223; email:

info@lamorindaweekly.com

website:

www.lamorindaweekly.com

Submit stories
 and
 story ideas to
storydesk@lamorindaweekly.com