



## Holiday Gift Guide

Need a bit of inspiration for your holiday shopping list? Abacus has a "[nice list](#)" for one and all—from toys to books to experiences. Share the gift of financial literacy for life.

## Planners to the End

Abacus is all about the plan, even the final plan. To help you make burial and funeral decisions and share them with your loved ones, this



Abacus [outline](#) addresses everything from cremation (or not) to the music. One client has already shared that he is planning for a tequila toast with AC/DC playing in the background!



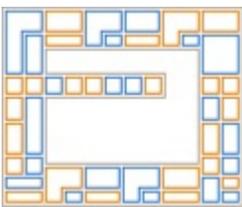
## Meet Our Shareholders

Abacus has expanded ownership of the firm from three to seven shareholders. Our goal is twofold: to retain and engage talented team members and to create a firm that will serve our clients for generations to come. This month, we would like to introduce you to [Laird Green](#). Laird leads our

Greenville office in serving clients and the Greenville community. [Greenville Business Magazine](#) recently featured Laird's article [Teaching Children Financial Literacy](#). Kudos to Laird for her many talents and work ethic that are the hallmarks of her success at Abacus.

## The Stories that Bind Us

Abacus celebrated our 21st holiday party with a day of storytelling. From sharing stories of Abacus holiday parties past to touring the [Hampton-Preston Mansion](#) with its stories of both owners and enslaved people, we ended by sharing our own stories of treasured holiday traditions with one another via [StoryCorps](#). For storytelling with your family over the holidays, we recommend "[Do You Know](#)." The questionnaire designers found a high correlation between strength of family history knowledge and happier, healthier children.



## Athena's Corner—The Shift from Active to Passive Investing: What are the Risks?

Abacus embraced passive investing in its nascent years. Today, passive investing through mutual funds and Exchange Traded

Funds (ETFs) represents 25% of all investors. This dramatic shift in investment style led the Federal Reserve of Boston to ponder the risks of passive investing to the stability of our financial systems. The resulting [white paper](#) affirms Abacus's commitment to passive investing and debunks concerns by active managers that risks to financial stability are on the rise.

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