

Welcome to the Roaring 20's.
The 2020's, That Is...
How Technology Can Help With Finances

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The Future ain't What it used to Be

- Welcome to the Future we never Dreamed of
- The 1960s/1970s led us to Believe in something different
- Advent of Moon Landing and Super-Sonic-Transport
- Star Trek and the Jetsons gave us Confidence in
 - Robotic Servants
 - Flying Cars
 - Warp Speed
 - Beam me up Scottie
- Focused on Physically moving Faster/Higher/Farther

Predictions of Futurists often off the Mark

- Visions of Future viewed in Technology currently available
- Actual Future unfolds with no such Limitations
- Instead of moving People at WARP Speed we have instead:
 - Found much greater Efficiency and Value in the following:
 - Moving Data at WARP Speed
 - World's Encyclopedia at our Fingertips
 - Global Video Conferencing 100+ people all at once
- World far more Efficient/Connected than ever dreamed of

The Future is Now...

- Amount of \$ Corporate America spends on Technology
 - More than Doubled since the 1960s/1970s
 - 1980 Capex on Technology was 22%...Today 50% of each \$
 - Q2 of 2020 \$1.32 Trillion spent on SAS/Tech Equipment
- Still in the early Stages of this Massive Shift:
 - Last Decade Tech Capex doubled from 4% to 8%
 - Salesforce.com and the old Rolodex example
 - A/M/G spend \$10-\$15 Billion/year on Data Centers & Cloud
 - Online Purchases still only account for 10% of all Retail Sales

Like 1920's Virus Exacerbated these Trends

- Great Recession of January 1920 – July 1921 (18 months)
 - Absorption of millions of Veterans into the Economy
 - Economic Effect of the Spanish Flu 1918-1920
 - Transitioning from Wartime to Peacetime Economy
- Much like the 1950s & 1990s Technology changes Evolve
 - Mass adoption of Radio/Movies/Phonograph
 - Invention of the Bulldozer and Construction Boom
 - Assembly Line Production of the Automobile
 - Development of Penicillin to treat Bacterial Infections

Roaring 2020's brought on by the Following

- Global Pandemic of COVID-19 & Synchronized Economy
 - Heightened Awareness by across these major institutions:
 - Businesses/Governments/Financial Markets/Society in General
 - Need for Advancement in Technological Products & Services
- Broadening Need for Telecommuting and the following:
 - Storage of Data and the Protection of our Information
 - Financial Transactions without Physical touch
 - Medical Procedures/Surgeries/Counseling without Physical Touch
 - Delivery Services using Energy Efficient means of Transportation

Technology-based Investment Opportunities

- The 5**C**'s of Opportunity brought on by the **C**oronavirus
 1. **C**ommerce – transition from Physical to Electronic
 2. **C**ashless Transactions – acceptance of Mobil Pay
 3. **C**ure – race to develop a vaccine for COVID-19
 4. **C**loud Storage – the new/improved massive File Cabinet
 5. **C**ybersecurity – protecting our data from the Bad guys

Question is...How do I even start the Process?

- What Technology-based Investor tools are you using?
- Do they help you to Address these Key Questions?
 - ✓ ALWAYS Knowing what you own and why you own it
 - ✓ ALWAYS Knowing what you are paying for what you own
 - ✓ ALWAYS Knowing how each component interacts together
 - ✓ ALWAYS Knowing how overdiversified you really are
 - ✓ ALWAYS Knowing the Tax ramification of every decision

The Technology-led Roaring 2020's are here

- Previous Global Crises have led to Investment Revolutions
- Think of the 30 Years following the US Civil War
- Think of the Roaring 1920's following Spanish Flu/WWI
- Think of the 1950s to the Mid-1960s following WWII
- Think of the 1980-1990s following Inflation of 1970s
- Warren Buffett & Sir John Templeton understood this
- Via Capex US Companies are greatly investing in Technology
- How about You? Where do you see Opportunity?

Any further questions for Chuck or a complimentary
portfolio review may be directed to Linda Smith at

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