

THE PA REPORT

The Portfolio Advisors, Inc.
eNewsletter



Editor's Note:

Summer is just around the corner in the Central Valley, and our May e-newsletter is here with fresh insights, service updates, and highlights from our team and community.

What to expect:

- News and Events
- Market Insights
- Resources
- Team Updates
- And more!

**One Time Planning
Services**

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**Market Update
with AJ Flores**



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Our Mission: Enriching Lives Through Transformative Action

ONE TIME PLANNING SERVICES



Snapshot of comprehensive financial planning

We have designed our one-time planning services for individuals and families (non-clients) who want professional financial guidance without committing to an ongoing advisory relationship. These focused engagements address specific areas of your financial life—such as retirement planning, Social Security, tax return reviews, CalSTRS and CalPERS analysis, or investment portfolio second opinions. You'll receive personalized recommendations and actionable insights tailored to your unique situation.

Our Services



Tax Return Review



Social Security Review



CalSTRS/CalPERS Review



Investment Second Opinion



Estate Settlement Services

[Check Out Our Site To Learn More!](#)

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MARKET UPDATE: A STRONG REBOUND, AND A REMINDER TO STAY BALANCED

By AJ Flores, CFP®

Welcome to this month's market update, where we try to make sense of the headlines without letting them run the show. After a difficult first quarter, markets bounced back sharply in April. Strong corporate earnings, renewed enthusiasm around artificial intelligence, and improving investor sentiment helped push major U.S. stock indexes higher. That said, we do not view one strong month as a reason to change course. Just as we try not to overreact when markets pull back, we also try not to get carried away when markets rally. Investing is a long-term process, not a monthly scoreboard.

Markets Rebounded

April was a strong month for U.S. stocks:

- **The S&P 500 climbed 10.42%**
- **The Nasdaq 100 gained 15.64%**
- **The Dow Jones Industrial Average rose 7.14%**

Much of the strength came from large technology and AI-related companies, especially those showing strong earnings growth. That leadership helped markets recover from some of the weakness we saw earlier in the year.

At the same time, when a narrow group of companies drives a large share of returns, it is a reminder to stay aware of concentration risk. Owning what has worked recently can feel good, but diversification still matters.

The Economy: Still Growing, But Complicated

Economic data continues to send mixed signals. Some areas remain resilient, including parts of the labor market and corporate earnings. Other areas, such as consumer sentiment and inflation expectations, are less comfortable. More simply said: the economy is still moving, but not without bumps.

Inflation and Rates Remain in Focus

The Federal Reserve held rates steady at its April meeting, keeping the target range at 3.50%–3.75%. Inflation has improved from its prior highs, but higher energy prices and other cost pressures have kept the Fed cautious.

For households, this matters in practical ways: borrowing costs, savings yields, mortgage rates, and bond returns can all be affected by the rate environment.



What This Means for Your Plan

Market updates can be useful, but they should not become a reason to constantly tinker. The goal is not to react to every headline. The goal is to make sure your plan is built well enough to handle different environments.

A simple check-in includes:

- **Does your investment mix still match your goals and time horizon?**
- **Are you more concentrated in a few companies or sectors than intended?**
- **Do you have enough cash reserves for those unanticipated expenses? Do you have enough in lower-volatility investments like bonds to supplement cash flow so that your long-term investments can stay long-term?**

If you would like to review your portfolio or talk through how recent market activity affects your plan, we are here and happy to help.

– AJ Flores and the Portfolio Advisors Team

We're Hiring!



Open Positions:

- **Advisor**

Advisors provide technical financial planning and investment management work under the guidance and supervision of a Lead Advisor and/or Senior Advisor. We welcome you to help us find the next great PA team member!

[Learn More & Apply Here](#)

Congratulations Logan!



We are proud to congratulate Logan Sumter on graduating from **California State University, Fresno** with a degree in **Business Administration and an emphasis in Finance** from the **Craig School of Business**. Logan's hard work and dedication reflect his commitment to building a strong foundation in financial planning, and we are excited to see him continue growing in his role at Portfolio Advisors Inc. Ever since he walked through our doors as an intern, he has been an absolute rock star at work! Thanks for all you do Logan and let's all give Logan a big round of applause on such a huge achievement.

Go Dogs!!





United for Women's Heart Health

Tina Mistry was honored to attend the Central Valley Go Red for Women Luncheon hosted by the American Heart Association. This inspiring event brought together survivors, healthcare professionals, community leaders, and advocates to raise awareness about cardiovascular disease—the leading cause of death among women—and to support lifesaving research, education, and local programs that help women better understand and manage their heart health.



Supporting Lifesaving Research and Local Programs

Funds raised through the luncheon help advance critical scientific research while also supporting initiatives throughout the Central Valley, including high blood pressure management, nutrition security, and cardiac emergency preparedness. We are grateful for the opportunity to stand alongside so many dedicated individuals working to build healthier communities and ensure every woman has access to the information and care she needs to thrive.

[Read more on the event](#)

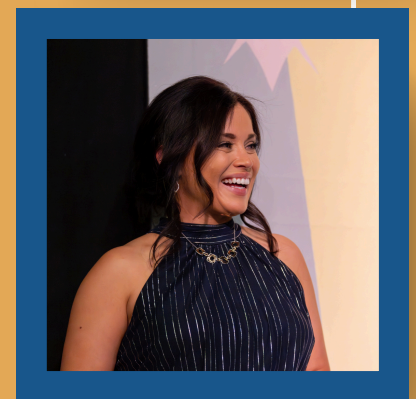
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Reading & Beyond Gala



An Inspiring Evening with Reading & Beyond

Portfolio Advisors Inc. was honored to attend the annual Reading & Beyond Gala, an inspiring evening dedicated to supporting literacy, education, and family services throughout our community. The event brought together local leaders, advocates, and supporters to celebrate the important work of Reading & Beyond and its commitment to helping children and families build brighter futures. We are grateful for the opportunity to support an organization whose work continues to make a lasting difference across the Central Valley.



Buddy: The Buddy Holly Story

Guests enjoyed a special performance of Buddy: The Buddy Holly Story at Roger Rocka's Dinner Theater, along with live and silent auctions that helped raise critical funds to support Reading and Beyond's programs adding a memorable touch to an already meaningful night.

[Read more on the event](#)

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2026 WOMEN IN BUSINESS AWARDS



WOMEN IN BUSINESS AWARDS (WIBA) - CELEBRATING IMPACTS BEING MADE

We had the pleasure of attending an evening with **Fresno County Women's Chamber of Commerce** at the **River Center** — bringing together professionals, entrepreneurs, and community leaders for an evening focused on conversation, networking, relationship-building and celebrating the impacts being made by women in our communities.

Portfolio Advisors Inc. was honored to attend the Fresno County Women in Business Awards at The River Center near Woodward Park. As the **Presenting Sponsor**, we were grateful to support an event that celebrates the remarkable women and businesses helping shape the future of the Central Valley through their leadership, innovation, and service.

Tina Mistry, CFP®, shared her sentiments on love for the community of women she is a part of while highlighting the work Portfolio Advisors Inc. for the Central Valley.



CONGRATULATIONS TO THIS YEAR'S HONOREES

We extend our heartfelt congratulations to all of the 2026 award recipients. Your leadership, perseverance, and commitment to serving others are truly inspiring.

The work you do within your organizations and throughout our community is creating meaningful and lasting change. Thank you for the example you set and for the many ways you continue to strengthen and uplift the Central Valley.

[Read more on the event](#)

THE P A TEAM

Our team continues to expand and develop. This section provides an overview of both long-standing and new team members and serves as a resource for identifying the appropriate contacts for your needs. We're here to support you.



Tina Mistry, CFP®

✉ Tina@portadvisors.com

📞 559-432-8400 EXT 3

Tina is the **CEO & Senior Financial Advisor** of Portfolio Advisors Inc., where her primary focus remains on serving clients as a financial advisor and planner. With more than 17 years of experience in the financial services industry, she brings deep expertise, thoughtful guidance, and a client-first approach to every relationship. Tina is passionate about helping individuals and families make confident financial decisions, inspired by her firsthand understanding of how meaningful financial advice can positively shape long-term outcomes.

Contact me for:

- Advisory needs - I can address financial questions and deliver advice.
- Speaking opportunities - I can speak to a local group & present on a financial topic.
- Feedback - I am happy to listen to your suggestions on how we can improve.
- Referrals - I welcome warm introductions to those seeking an advisory relationship. (Always happy to meet over coffee!)



AJ Flores, CFP®

✉ AJ@portadvisors.com

📞 559-432-8400 EXT 2

AJ is a **Lead Advisor** at Portfolio Advisors Inc. and has been with the firm since 2014. He began his career at Portfolio Advisors as a part-time intern while completing his degree and has since progressed into increasingly senior advisory roles, bringing a deep understanding of the firm's planning philosophy and client-centered approach. As a Certified Financial Planner™ professional, AJ is committed to helping individuals and families navigate complex financial decisions with clarity. He focuses on delivering transparent, fiduciary-based advice.

Contact me for:

- Advisory needs - I can address financial questions and deliver advice.
- Speaking opportunities - I can speak to a local group & present on a financial topic.
- Feedback - I am happy to listen to your suggestions on how we can improve.
- Referrals - I welcome warm introductions to those seeking an advisory relationships

THE PA TEAM CONT'D



Logan Sumter

✉ Logan@portadvisors.com

📞 559-432-8400 EXT 5

Logan is an **Associate Advisor** at Portfolio Advisors Inc. and holds a degree in business administration with an emphasis in finance. In his role, Logan supports the advisory team by assisting with financial analysis, preparing planning materials, and helping ensure a smooth and responsive experience for clients. He works closely with Lead Advisors to organize financial data, develop planning scenarios, and support ongoing client relationships, contributing to the firm's commitment to thoughtful, personalized financial guidance.

Contact me for:

- Advisory needs - I can address financial questions and deliver advice.
- Portfolio and trading requests - I can review your portfolio and recommend trading for withdrawals, contributions, and overall rebalancing.
- Investment and planning/analysis - I conduct research on a variety of investment and planning topics to address client questions.



McKade Gleason

✉ mckade@portadvisors.com

📞 559-432-8400 EXT 6

McKade is a **Paraplanner & Client Services Associate** at Portfolio Advisors Inc. and has been with the firm since June 2024. He now plays a key role in supporting both the advisory and client service teams. In his position, McKade assists with preparing financial plans, organizing client information, and supporting day-to-day service needs to help ensure a smooth and responsive client experience. He works closely with Advisors to support planning strategies and contribute to the firm's commitment to clear, client-focused financial guidance.

Contact me for:

- Service requests - I can process a variety of client service requests including deposits/withdrawals, account opening, initiating trades, and other administrative actions.
- Investment and planning/analysis - I conduct research on a variety of investment and planning topics to address client questions. I prepare financial plans, tax analysis, and create deliverables around other financial topics.

THE PA TEAM CONT'D



Jessica Woods

✉ jessica@portadvisors.com

📞 559-432-8400 EXT 1

Jessica Woods is the **Client Services Manager & Compliance Associate** at Portfolio Advisors Inc. and has been with the firm for more than 15 years. In her role, Jessica oversees client service operations, supports regulatory and compliance processes, and helps ensure that clients experience a high level of care, consistency, and professionalism at every stage of their relationship with the firm.

Contact me for:

- Client service requests - I can process a variety of requests including deposits/withdrawals, account opening, account transfers, etc. I can also provide information regarding required minimum distributions, ongoing withdrawals/deposits, & general account information.
- Reporting & compliance questions - I can answer questions regarding our firm documents, fees/billing questions, online report portal questions, & general reporting preferences.



Andrew Bounnavong

✉ andrew@portadvisors.com

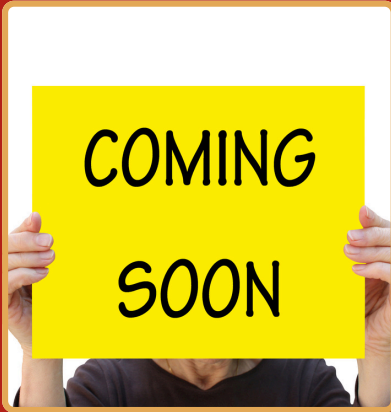
📞 559-432-8400 EXT 7

Andrew is the **Marketing Director** at Portfolio Advisors Inc. He brings a strong background in digital marketing, brand strategy, and operations, helping shape the firm's brand presence and enhance the overall client experience. Andrew works closely with leadership and the advisory team to support firm-wide initiatives, marketing strategy, and operational processes. His focus on thoughtful communication and brand consistency helps ensure the firm's values and client-first approach are clearly reflected across all touchpoints.

Contact me for:

- Content ideas - If you have content ideas for our newsletter, blog, & website, I would love to hear them!
- Client hosted events - Interested in co-hosting an event with us, centered around your interests & hobbies? We would love to collaborate!
- Reviews/Testimonials - Please send me your client reviews/testimonials! I can also assist with Google reviews!
- Opportunities - We welcome opportunities to spread the word about how we deliver financial planning!

THE PA TEAM CONT'D



Vanessa Zavala

✉ vanessa@portadvisors.com

☎ 559-432-8400 EXT 9

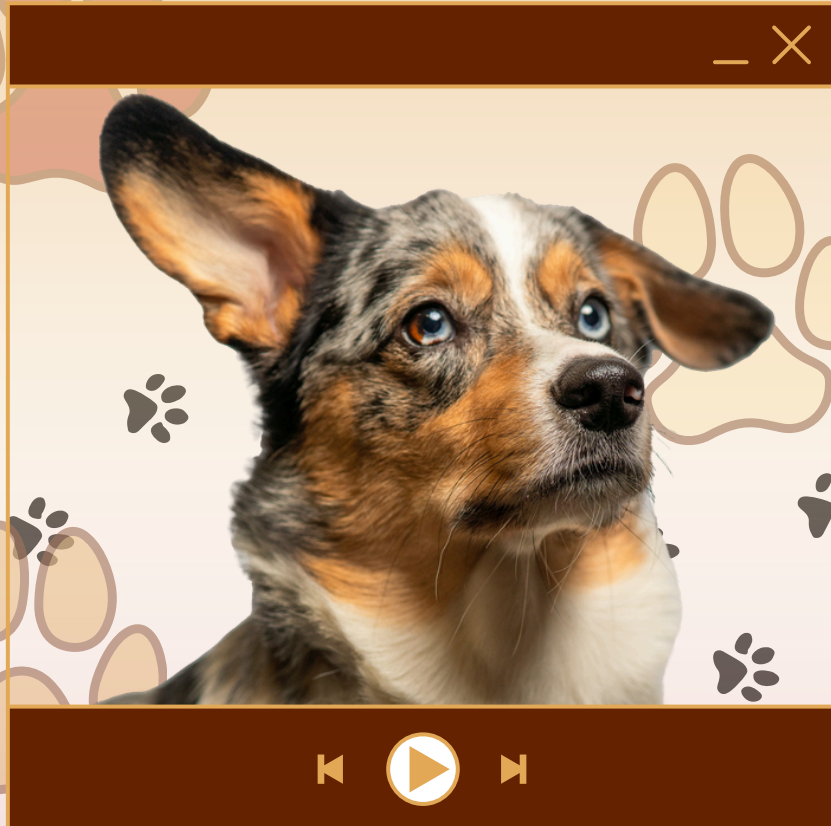
Vanessa is the **Client Services & Operations Associate** at Portfolio Advisors Inc. and has been with the firm for less than a year. Her previous work with a third party administrator and large brokerage firm bring valuable client service experience to our firm. She brings professionalism, organization, and a high level of care to the families that we serve. We look forward to her continued development and growth at PA. (P.S. She may be greeting you at the door when visiting the office, so please feel free to say hello!)

Contact me for:

- Schedule meetings, paperwork questions, and help with electronic platforms.
- Client service requests – I can process a variety of requests including deposits/withdrawals, account opening, account transfers, etc.
- Not sure who to direct your question to? Please feel free to contact me and I can be sure to connect you with the right team member!

We hope that providing the above mentioned introductions and re-introductions of our team is helpful to you. We aim to provide you a high level of service and be a resource to you. We welcome you to contact our team with any feedback or questions. Thank you!

DAY IN THE LIFE OF REMY!



[Watch Video](#)

Go behind the scenes at Portfolio Advisors for a fun, lighthearted look at a day in the office—through the eyes of Remy, our Chief Morale Officer. From morning greetings to keeping the team energized throughout the day, Remy gives you a glimpse into the culture, connection, and personality that make our office special. It's a side of our team you don't always see—and one you won't want to miss!

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THANK YOU !



We want to extend our sincere gratitude to everyone who took the time to vote for Portfolio Advisors Inc. in the Fresno Bee's Best of Central California voting competition. Your support and encouragement truly means the world to our entire team.

Stay tuned! Results will be released end of May/early June!

Regardless of the outcome, we are incredibly thankful to be part of such a supportive community and to serve clients like you.

Thank you again for standing with us—it does not go unnoticed, and it is deeply appreciated.



THE WRAP-UP

May 2026

Monthly Highlights

One Time Planning Services

Discover how our One-Time Planning Services provide focused financial guidance on retirement, taxes, Social Security, and more—without the need for an ongoing advisory relationship... [Read More Here](#)

April Market Update

Join AJ Flores for our April Market Update as he shares timely perspective on recent market activity and key insights to help investors stay focused on their long-term goals... [Read More Here](#)

April Events

Take a quick look back at Portfolio Advisors Inc.'s April events, including the Reading and Beyond Gala, Women in Business Awards, and Go Red for Women Luncheon... [Read More Here](#)

Reintroducing Firm

At Portfolio Advisors Inc., our team works collaboratively to support every aspect of your financial life. Below is a guide to who does what—and who to contact depending on your needs. [Read More Here](#)

Thank you for being part of our network. Stay tuned for more educational events, firm updates, and resources to help you keep informed.

Share Your Experience

We truly value your feedback and would love to hear about your experience with us! You're welcome to leave a **Google Review** by clicking [here](#) or you can **share a testimonial** by emailing us at:

andrew@portadvisors.com

Office Closures

MAY

25

JULY

3

JUNE

19

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