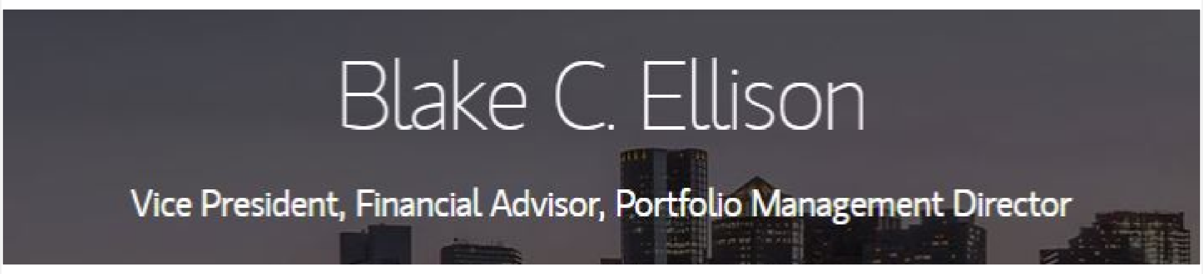

August Newsletter

Teaching Teens About Money

As your kids grow into young adults, I want to be a resource to help teach them how to manage their own finances. Below is an article from the Firm that lays out a timeline of when your children should learn about various topics. If there is an area of focus you would like a hand with, feel free to get in touch!

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Market Talk

In his August equity market commentary, Andrew Slimmon, Head of the Applied Equity Advisors Team, offers his perspective on the state of the market, including his assessment that stocks may rally in the second half in anticipation that earnings growth may improve in 2024.

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What Kind of Retiree Do You Want to Be?

Everyone has a different idea of their dream retirement. Whatever you envision, it's essential to plan ahead so that your nest egg will last.

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The State of Your Parents' Estate

Talking with a parent about estate planning has the potential to be an uncomfortable topic. This piece offers several conversation starters that can help adult children and their parents plan for the future.

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