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September Newsletter



Fourth Quarter Preview

Andrew Slimmon, Head of the Applied Equity Advisors Team, recently appeared on Bloomberg, providing three reasons why he is optimistic the market will drive higher in the fourth quarter.

[Watch Video](#)

Simplify Your Finances

Having an array of financial accounts hinders your ability to track cash flows and can cloud your understanding of your net worth. Consolidating into one relationship can help you meet long-term investment goals and manage day-to-day cash management needs.

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How AI Could Reshape Healthcare

Companies that interact with patients earlier in the care continuum are well positioned to capitalize on artificial intelligence (AI) while avoiding disruption. In addition to diagnostics, monitoring technology stands out as another potential area for investment. Check out Morgan Stanley Research's recent report on how AI and machine learning could transform the sector.

[Read More](#)



Fending Off Robocalls

Fraudsters are continuously devising new schemes to take control of your phone to perpetrate identity theft and fraud—and if they succeed, the damage can be significant. Check out our report on the steps you can take to limit fraud, robocalls and robotexts.

[Read More](#)



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Because of their narrow focus, sector investments tend to be more volatile than investments that diversify across many sectors and companies. Health care sector stocks are subject to government regulation, as well as government approval of products and services, which can significantly impact price and availability, and which can also be significantly affected by rapid obsolescence and patent expirations.

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