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June Newsletter



As we move into the summer months, I find myself reflecting not just on the mid-year market trends, but on the personal milestones that define our lives. On May 30th, my family celebrated a major one—my youngest son, Storm, graduated from high school. Watching him cross the stage was a proud moment, and a vivid reminder of how quickly time moves. Above, I have shared a couple photos from the big day. One of myself and Storm along with one with his two siblings, Sage and Cole.

Transitions like these always reinforce why we plan for the future in the first place and are a powerful reminder of what we are working toward. Whether it is preparing a child for college, managing a business transition, or planning for retirement, every strategy we build is designed to protect and support these exact moments.

Turning our attention to the financial landscape...

Inside this month's newsletter, you'll find resources on protecting yourself against growing surveillance and data privacy concerns and exploring the 2026 Mid-Year Outlook. I've also included an important piece on the rise of AI-powered scam calls and practical steps you can take to protect yourself and your loved ones, along with research on how changing global trade dynamics are driving a resilience boom.

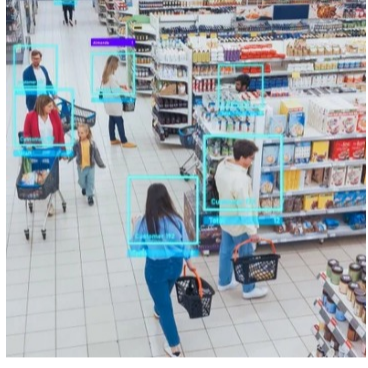
In Ashley's Client Corner, you'll find a practical Summer Financial Checklist covering everything from travel planning and mid-year financial housekeeping to having meaningful conversations about money with family and loved ones.

And because every great summer deserves something homemade, we've also included a timeless chocolate chip cookie recipe with a few special twists that might make you rethink your own. If you decide to give it a try, let us know what you think, and whether it earns a permanent spot in your recipe collection.

As always, thank you for the trust you place in me. I hope you enjoy this month's edition, and I wish you and your family a safe, relaxing, and memorable start to summer.

Warm regards,
Blake

Featured Updates and Resources



Here's How Your Favorite Stores Use Surveillance Data to Charge You More

From online to in-store, retailers track your behavior to set maximum prices. Here's how to fight back.

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2026 Midyear Outlooks

AI investment and spending by higher-income consumers supports global growth. But the energy supply shock from the conflict in Iran still generates uncertainties. For markets, the balance of risks favors developed-market equities, led by U.S. stocks.

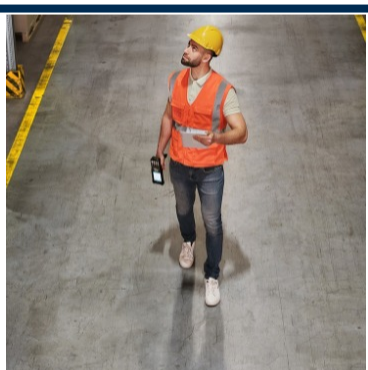
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AI-powered scam calls are getting more convincing—and more common

For decades, hearing a familiar voice or seeing a known number was often enough to signal trust. That assumption is breaking down as scammers gain access to tools that can mimic voices and spoof caller IDs

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Investing in the Resilience Boom

The era of frictionless trade is fading. Supply chains are being rewired for security as governments tighten control over critical inputs, creating new investment opportunities.

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Ashley's Client Corner

Financial Summer Checklist

With summer plans taking shape and calendars filling with travel, activities, and time with family and friends, this can be a great opportunity to take a quick look at seasonal spending and planning priorities—helping you stay organized through a busy season. We hope you find these resources helpful!

[Learn More](#)

Chocolate Chip Cookies

A game-changing recipe—elevated with a few simple professional techniques, like using vanilla bean paste and making your own brown sugar with molasses.

[View Recipe](#)



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