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July Newsletter

As we hit the peak of summer, I am pleased to bring you the latest insights and resources in the July edition of my newsletter.

This edition is packed with valuable information on tax reduction strategies, financial planning during volatile markets, and an exclusive invitation to Morgan Stanley's Midyear Economic & Investment Outlook. Additionally, don't miss our feature on Morgan Stanley's Client Perk Program, offering discounts on travel, hotels, events, car rentals, and more.

I hope you find these resources helpful as you navigate the months ahead. Please don't hesitate to reach out if you would like to discuss any of the topics below. Your feedback is greatly appreciated, and I look forward to hearing from you soon.

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Featured Updates and Resources

5 Steps That May Reduce Taxes on Clients' Income and Portfolio



There are several steps you can take to mitigate taxes and help potentially boost your after-tax returns. Take a look at this article to learn about five steps that may help reduce taxes on your investment portfolio.

[Read More](#)

Exclusive Invitation: Money Monday Midyear Economic & Investment Outlook



In our most recent Money Monday event, Morgan Stanley Chief U.S. Economist Ellen Zentner and Head of Market Research & Strategy for Morgan Stanley Wealth Management Dan Skelly discussed what the remainder of 2024 may hold for investors. Topics included:

- The state of the U.S. economy and the American consumer
- Investing during an election year
- Key portfolio considerations amid stagnation, inflation and a challenging housing market

[Watch the Replay](#)

How to Plan Instead of Panic in Volatile Markets



A recent report from our Global Investment Office looks at 120,000 investor financial plans during the 2020 COVID market crash. What it found may surprise you: Clients who were on track to achieve their goals at the market's peak remained on track at its trough.

Having a sound financial plan can help you avoid making rash decisions in times of uncertainty and missing out when markets recover.

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On the Markets: July 2024

Halftime Show and the Music Plays On



With markets poised to broaden, we think now's the time for equity investors to focus on "quality value" themes. Find out more in On the Markets. This publication summarizes the Global Investment Committee's market outlook and contains thought-provoking essays that examine the forces shaping the investment landscape.

[Read More](#)

Summer Olympics

Fri. July 26 - Sun. August 11



As the Summer Olympics kick off later this month, we are thrilled to cheer on Team USA in Paris! It's always inspiring to see the greatest athletes compete on the world's biggest stage.

[View the Full Schedule Here](#)



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