Blake C. Ellison

Vice President, Financial Advisor, Portfolio Management Director

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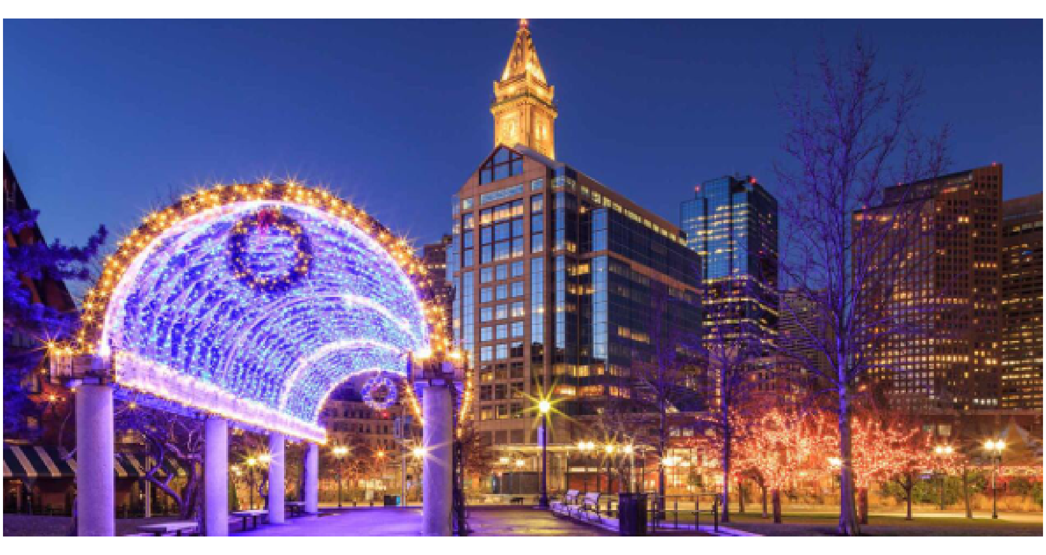
December Newsletter



[Client Preferred Name]

As we approach the final days of 2025, I want to take a moment to express my gratitude for your trust and partnership. This December newsletter is not just about financial insights and outlooks for the coming year, but also about embracing the warmth and joy of the season.

Inside, you'll find the latest updates to help guide your financial journey, as well as a few winter recipes and local community events to enjoy. I hope this blend of practical advice and seasonal cheer helps you step into the new year feeling informed and inspired.

If 2025 taught us anything, it is that agility and discipline remain the cornerstones of successful wealth preservation and growth. As we turn to 2026, the economic narrative will undoubtedly shift again. Our philosophy will not. In sharing my personal newsletter throughout the year, I am hopeful they help outline how we position portfolios to capture growth where it exists and defend capital where it counts. Ensuring we stay on track regardless of which way the economic wind blows.

Real wealth is the ability to live life on your own terms, to support the causes you care about and to secure a future for the people you love. My primary goal remains unchanged: to provide the stewardship and clarity necessary for you to focus on what truly matters. Best wishes for a joyful and peaceful holiday season!

Warm regards,

Blake

Featured Updates and Resources

2026 Investment Outlook: U.S. Stocks Shine in Spotlight of Favorable Conditions

Risk assets are poised for a strong year in a friendly policy and macroeconomic environment, with U.S. stocks outperforming peers. U.S. government bonds are likely to weaken after a rally in the first half of the year.

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2026 Economic Outlook: Moderate Growth With a Range of Possibilities

U.S. consumer spending and capital expenditures on AI are likely to drive moderate growth as global inflation slows.

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Your 2025 Guide to Holiday Giving

As you reconnect with loved ones for the holidays, consider these impactful ways to give.

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The Longevity Effect

Morgan Stanley leaders discuss how the world's aging population presents challenges, but also opportunities for businesses and investors.

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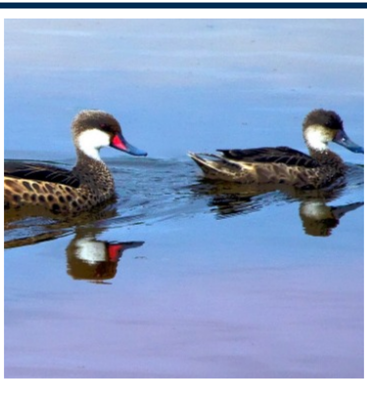

3 Tax Questions Every Investor Should Ask

Factoring the impact of taxes into your portfolio and planning decisions can help you to keep more of your hard-earned money.

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Seasonal Corner

Recipes

Shepards Pie

Mulled Wine

Community Events

The Snowport Holiday Market

The Snowport Holiday Market Presented by Constant Contact will be open seven days a week November 7 - December 28, 2025.

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Worcester Vintage Holiday Market

The Worcester Vintage Holiday Market will feature 25+ vendors selling clothing primarily from the 80's, 90's, and 2000's!

Learn More

ZooLights

Step into Stone Zoo's sparkling winter wonderland and stroll along tree-lined paths aglow with thousands of twinkling lights.

Learn More

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