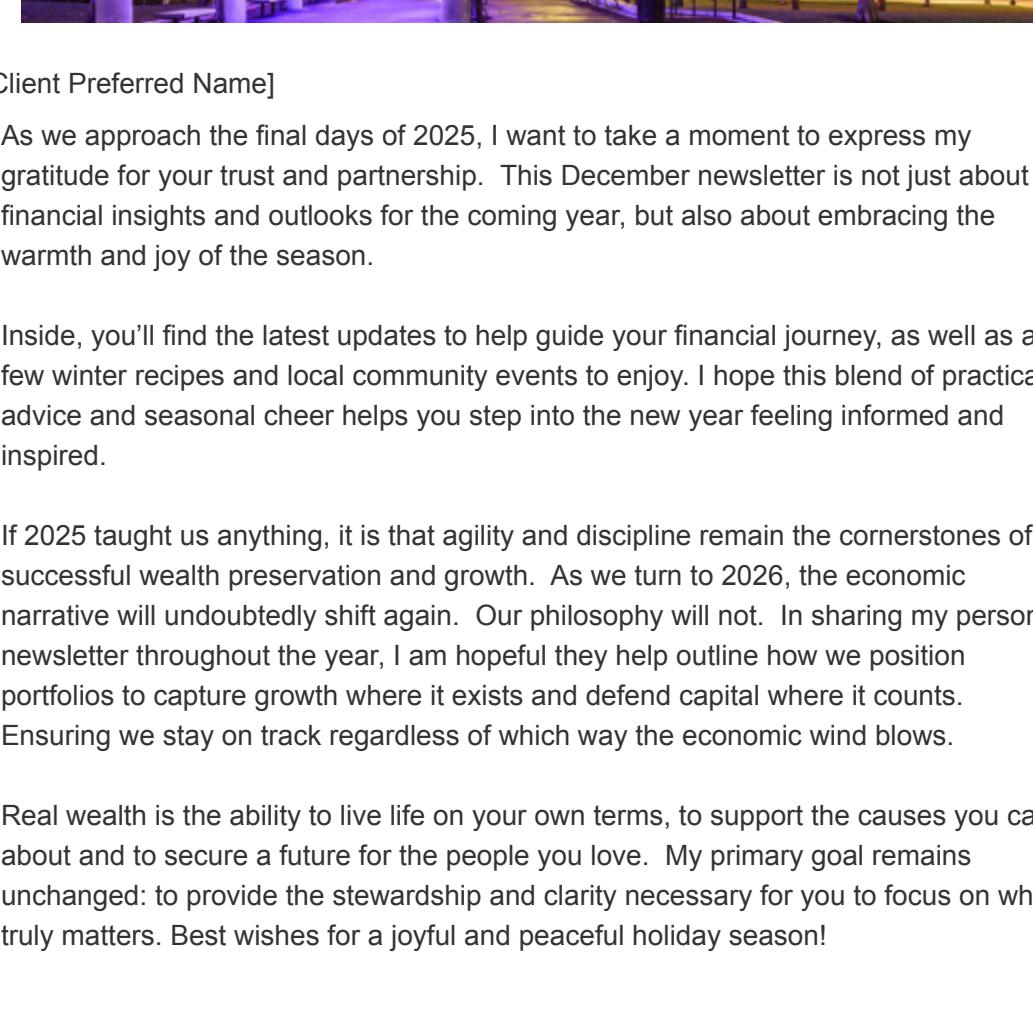


Blake C. Ellison

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,

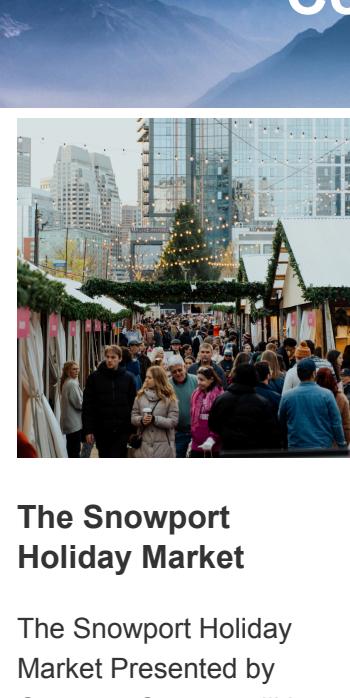
Blake

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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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.

[Read More](#)

3 Tax Questions Every Investor Should Ask

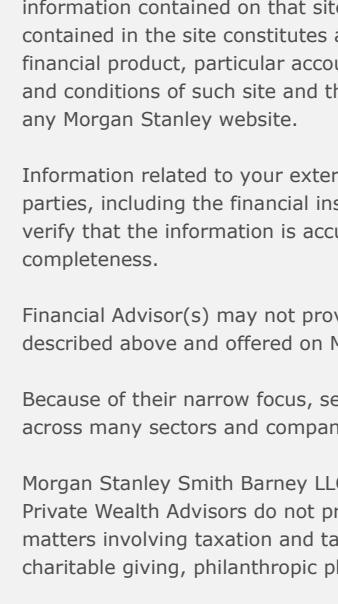
Factoring the impact of taxes into your portfolio and planning decisions can help you to keep more of your hard-earned money.

[Read More](#)

Seasonal Corner

Shepards Pie

Mulled Wine



Blake C. Ellison
Vice President
Financial Advisor
Portfolio Management Director

Phone: (508) 870-7011

Email: Blake.Ellison@morganstanley.com

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