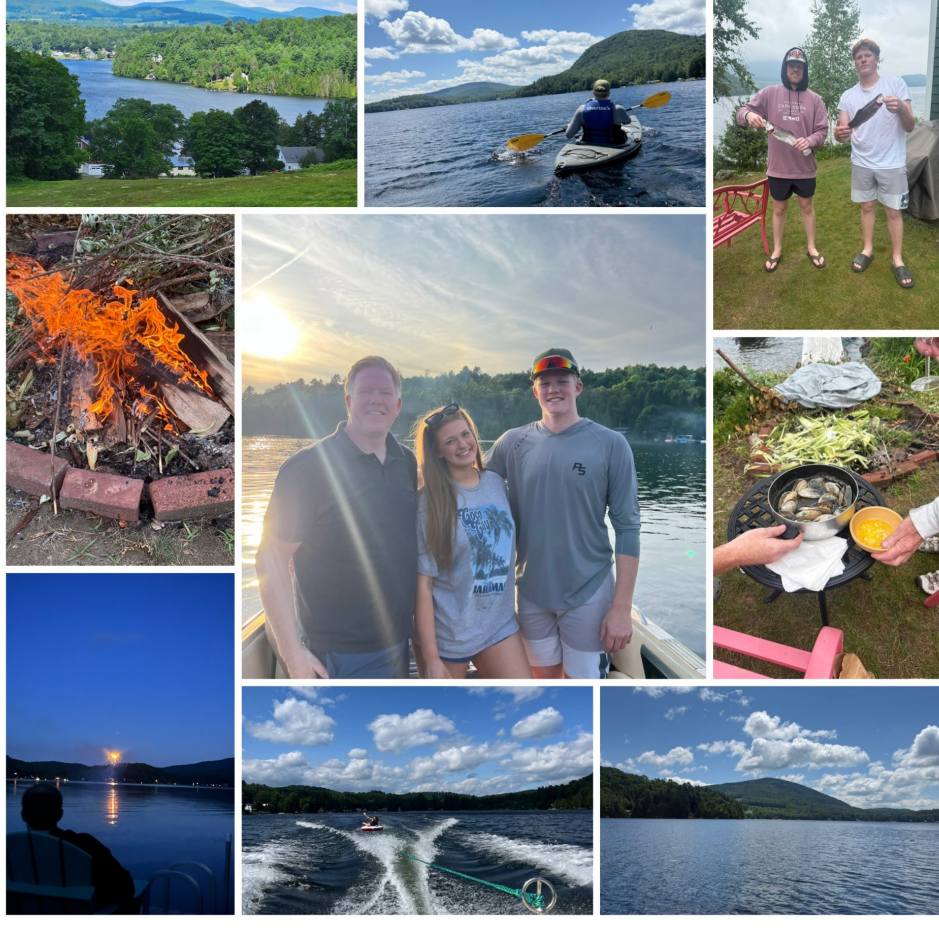


August Newsletter



I hope you are enjoying a wonderful summer. Here in New England, the season always feels fleeting, and with the cooler evening air starting to set in, it certainly feels like time is moving quickly. As mentioned in last month's newsletter, I was looking forward to spending a few days at the lake (Harvey's Lake in Vermont) with my kids (young adults now – ages 18, 21, 23). As they grow and spread their wings, I find myself even more appreciative of any time we can share together.

Speaking of spreading wings--to honor our nation's 250th anniversary of independence, our lake association put on a fireworks display from a barge on the water. The relocation was necessary to protect a pair of nesting bald eagles and their eaglets on the usual launching beach. Watching the fireworks over the water while preserving the eagles' haven made for a memorable celebration.

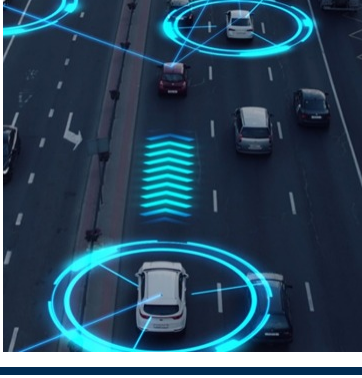
This month's newsletter explores several of the powerful forces driving today's investment landscape, from the rapid evolution of artificial intelligence and the infrastructure supporting it, to the emergence of robotaxis, the changing role of energy in the global economy, and what the approaching U.S. midterm elections could mean for markets and the economy.

We've also included a replay of our recent Wealth Education for the Next Generation event, a practical resource covering building a business. If you have children, grandchildren, or young professionals in your life, we encourage you to share it with them as they begin building healthy financial habits.

And because every month deserves something to enjoy beyond the headlines, you'll also find a delicious banana bread recipe to round out this edition. We hope these resources provide valuable insights, spark meaningful conversations, and help you stay informed as the year continues.

Warm regards,
Blake

Featured Updates and Resources



Robotaxis Enter the Fast Lane

Regulatory progress, AI advances and lower costs are accelerating the scale of the robotaxi industry.

[Read More](#)



Buying the AI Infrastructure Dip

Following recent drops in AI infrastructure stocks, Morgan Stanley Research revisits key debates and suggests ways for investors to play the dip.

[Read More](#)



AI Spending: A New Engine for the Global Economy

AI investment is reshaping the global outlook. In part one of this economic roundtable, our panel explores where the momentum is strongest — and where investment still needs to catch up.

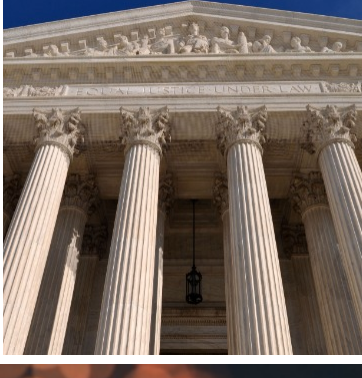
[Listen Now](#)



Energy: Transitioning to Resilience

The energy transition is moving beyond decarbonization, as rising demand and geopolitical shocks put resilience and security at the fore. Here's what to know.

[Read More](#)



US Policy Pulse

In this report, we discuss the midterm election and its relationship with economic and market performance.

[Read More](#)

Ashley's Client Corner

Entrepreneurship requires both vision and disciplined execution. I'm pleased to share the next session in our Wealth Education for the Next Generation series, "How to Build Your Business: Entrepreneurship & Founders," on Monday, September 14. This conversation is designed for founders, aspiring entrepreneurs and the next generation of business leaders looking to better understand what it takes to build, scale and sustain a successful business in today's evolving landscape, from sharpening a compelling value proposition to navigating capital decisions and growth strategies.

[Register](#)

Bannana Bread

This banana bread recipe creates the most delicious, moist loaf with loads of banana flavor.

[View Recipe](#)



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