

## April 2025 Newsletter

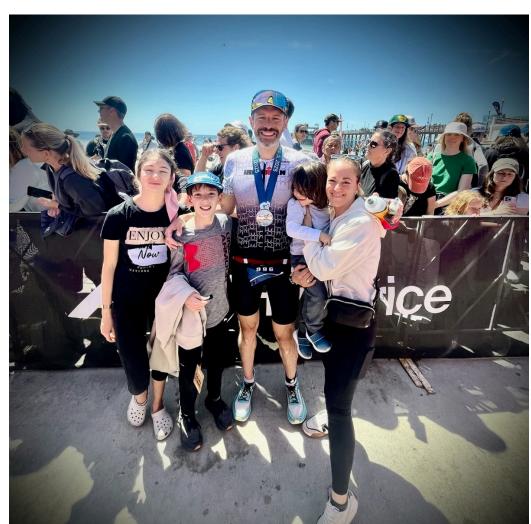
Carlos Duque, Vice President, Financial Advisor

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I completed my 4th Ironman 70.3 in Oceanside, California. My family and friends know that I like challenging myself constantly. Having a balanced life between work, family, and health is a priority, as it helps me to stay focused and be more productive!

Completing triathlons reminds me of the many challenges we all face in several life situations. My commitment to you and your family remains strong.



### **April Insights:**

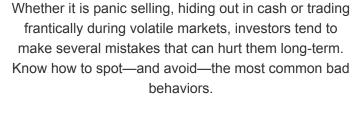


### On The Markets: Everything, Everywhere, All at Once

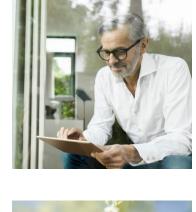
Given uncertainty over tariff negotiations, corporations are considering a variety of strategies to mitigate their impact. Find out more in On the Markets.

April Edition

### Top 5 Mistakes Investors Make in Volatile Markets



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# 5 Ways to Spring-Clean Your Finances

A lot can pile up over a year, or just a season. Here are five tips to help you tidy up, declutter and organize your finances this spring.

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