



January 2025 Newsletter

Carlos Duque, Vice President, Financial Advisor

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I open this newsletter wishing you and yours a very HAPPY NEW YEAR!

I hope you and your families had such a great Christmas and New Years Eve as we did. We spent the holidays at home.

I want to share with you that I had the opportunity to complete my third half Ironman in December, Indian Wells, California. I achieved my best record times in each category. Took me 6 hours 2 minutes to complete. The best part of it all was to experience it with my family.

Have a healthy and prosperous 2025!"



January Insights:



On The Markets: 2025 Is Showtime for Fundamentals

An economic soft landing and enthusiasm for AI have boosted markets, but now earnings and policy clarity are needed. Find out more in On the Markets.

[January Edition](#)



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Maximum Benefit and Contribution Limits for 2025

The IRS has increased contribution limits for 2025. Click below for a detailed list of all the new contribution limits.

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