

September 2026 Newsletter



September has a way of bringing us back into rhythm. As summer winds down and routines return, it can also be a natural time to revisit the decisions shaping your financial future.

In this month’s newsletter, we’re sharing our latest perspective on the equity outlook, along with a closer look at the growing use of artificial intelligence for financial advice—and where human judgment still matters most. We also explore how delaying retirement, even for a relatively short period, can have a meaningful impact on savings and potentially reshape a long-term financial plan.

In our Discovery Corner, you’ll find our Next Generation Gifting Considerations Guide, offering ideas to keep in mind when planning for the people and causes that matter most. And because September deserves something a little sweeter, we’ve also included a recipe for apple butter cinnamon rolls—an appropriately autumnal way to welcome the season.

As always, we hope you find something useful, timely and enjoyable in this month’s edition.

[Signature of Primary Contact]

Insights



Equity Outlook: A Constructive Case for Stocks

Rising earnings expectations support a constructive outlook for equities through the end of 2026, despite ongoing market risks.

Learn More



More of Us Are Using AI for Financial Advice: Here's Where I'd Draw the Line

AI can track spending, organize expenses, watch for unusual activity and remind us when to pay bills, but it can't offer personalized guidance that takes all of your individual circumstances into account.

Learn More



Delaying retirement just 6 months may yield an extra \$50,000. Here’s how.

At last check, Americans think they need \$1.46 million to live comfortably in retirement. If you are among the millions who are getting closer to retirement but don’t think you have enough money saved, don’t despair.

Learn More

Discovery Corner

Discovery Corner
Next Generation
Gifting Considerations

As you consider gifting, ask yourself how you would like children or other family members to use financial gifts.

Get Started

Seasonal Corner

Apple Butter Cinnamon Rolls

Perfect for a cozy Fall morning!

Get Recipe

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