



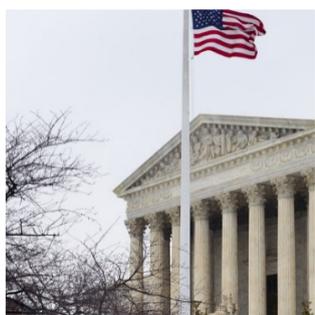
As winter begins to soften and the first signs of spring start to emerge, March offers a welcome opportunity to reset and look ahead. In this month’s newsletter, we’ve gathered several timely resources to help keep you informed during a season that often brings both important financial considerations and evolving developments in the global landscape.

And in the spirit of the season, we’ve included a few ways to enjoy the month ahead — from a Braised Corned Beef with Honey Mustard Glaze recipe that’s perfect for St. Patrick’s Day, to the festive Cape Cod St. Patrick’s Day Parade, a great local event that many look forward to each year.

As always, if you have any questions about the topics in this edition—or about your financial plan more broadly—please don’t hesitate to reach out. We’re always happy to connect. Wishing you a wonderful and refreshing start to the spring season.

[Signature of Primary Contact]

Monthly Insights



Global Markets Adjust to U.S. Tariff Reversal

A landmark ruling by the U.S. Supreme Court voids existing tariffs, prompting investors, companies and policymakers to reassess trade impacts.

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Tax Season 2026: Planning After OBBBA

How could the One Big Beautiful Bill Act shape your taxes and household finances? Top thought leaders share insights.

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Iran Conflict: Seven Takeaways for Investors

Prolonged conflict with Iran could lead to higher oil prices, hotter inflation and greater market uncertainty.

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Events and Eats

Braised Corn Beef

With Honey Mustard Glaze

[View Recipe Here](#)

Cape Cod St. Patrick’s Parade

Saturday, March 7, 2026

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