

January Newsletter



[Client Preferred Name]

Happy New Year!

I hope you and your family enjoyed the holidays!

As we step into 2026, I would like to extend my warmest wishes for a fulfilling New Year. This month's newsletter includes valuable insights and resources to kickstart the year on a strong note.

As always, feel free to reach out if you have any questions.

Warmly,
Joseph Lizzio

Virtual Event:



New Year, New Bill: What it Means for You

Join Chief Investment Officer **Lisa Shalett**, Head of Financial Planning **Anthea Tjuanakis Cox** and Head of U.S. Policy **Monica Guerra** for a timely discussion on the One Big Beautiful Bill Act and what it means for the tax and financial planning landscape.

As you prepare for tax season and review your family's financial plan, this session aims to help you:

- Understand the One Big Beautiful Bill Act and its implications
- Evaluate your current financial plan amid these changes
- Offer questions to ask yourself or your advisor as you review your portfolio
- Recognize the core components of a well-constructed financial plan

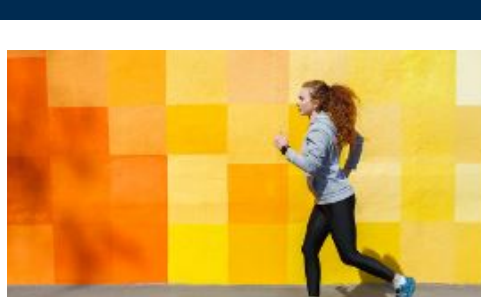
Virtual Webcast Date and Time

Tuesday, January 20th

4:15 PM EST

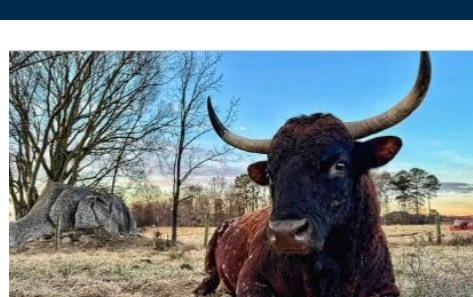
[Register](#)

January's Insights:



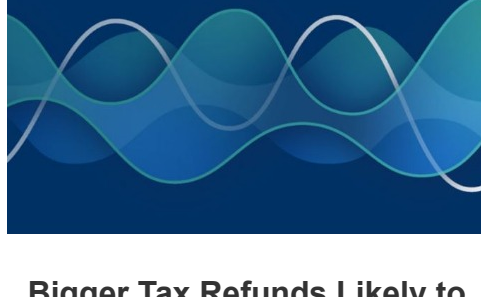
5 Personal Money Moves for the New Year

Heading into 2026, it's time to take stock of your budget, debt and investments—and check them against your financial goals. These five steps may help you get started.

[Learn More](#)


Will 2026 Tame the Bull Market?

A resilient economy and strong corporate earnings are likely to drive continued equity gains in 2026. But these gains may be tempered, with optimism already priced into valuations and policy risks looming.

[Learn More](#)


Bigger Tax Refunds Likely to Power the Economy

Our U.S. Economist Heather Berger discusses how larger tax refunds in 2026 could boost income and help support consumer balance sheets throughout the year.

[Learn More](#)


How to Plan Instead of Panic in Volatile Markets

How do you weather volatile markets? A study of nearly 120,000 investors reveals the value of having a sound financial plan to help keep you on track.

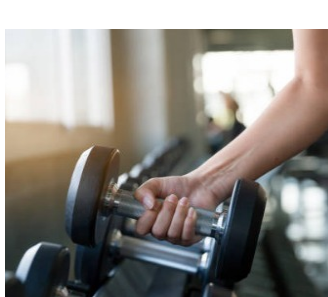
[Learn More](#)

January Highlights:



50 Best Places to Travel in 2026

This guide highlights some of the best places to visit in 2026, featuring emerging destinations, emerging hotspots, and ideas that make planning your next adventure feel exciting and within reach.

[Find Best Places to Travel](#)


Keeping Your New Year's Resolutions

Ready to stick with your goals this year? This article lays out seven practical tips to help you build habits that last, stay motivated, and turn your New Year's resolutions into real progress without feeling overwhelmed.

[7 Tips to Keep New Year's Resolutions](#)


Recipes to Ring in the 2026

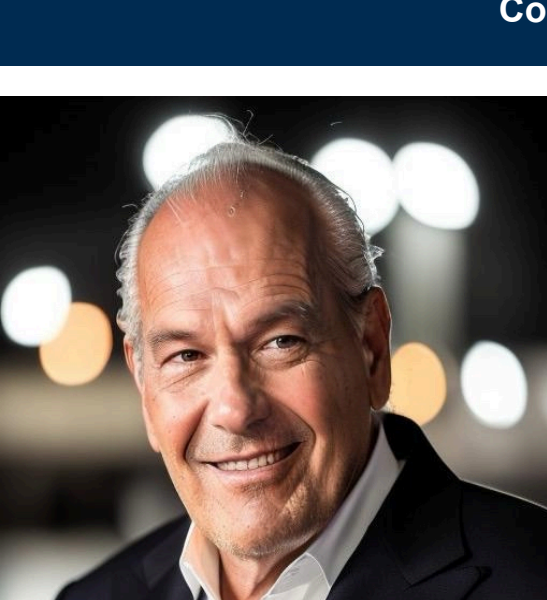
This article shares a delicious list of traditional New Year's Day foods from around the world, giving you tasty ideas to start the year with good fortune and flavor.

[2026 Recipes](#)

Thank you for reading our January newsletter!

We hope you found these insights valuable. As always, please don't hesitate to reach out to us with any questions or if we can be of assistance.

Contact Us:



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Senior Institutional Consultant
[Contact Joseph](#)

[Signature of Primary Contact]

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