



## April Newsletter

[Client Preferred Name]

Welcome to our April Newsletter!

I hope you find this edition helpful.

As we transition into April, the pace of the year becomes more established, creating a valuable window to sharpen focus and reinforce what's working. This month is an ideal time to check in on the goals and priorities you set at the start of the year, evaluate progress, and refine plans based on insights gained from the first quarter. With Q2 underway, April also offers a natural moment to build momentum, strengthen key routines, and align upcoming work with the outcomes you want to deliver in the months ahead.

In this April edition, you'll find practical tips to help safeguard your information during tax season, a six-step guide to building financial literacy, and why having a goal is key to investing.

Thank you for the trust you place in us. If you have any questions or would like to discuss any of the topics featured please don't hesitate to reach out.

## April Insights



### Why Having a Goal Is Key to Investing

With a clear goal in mind, investors can create a realistic plan to achieve their objectives within a certain time frame. Learn how to effectively identify your financial goals and create a strategy to achieve them.

[Learn More](#)



### Protecting Yourself From Tax Season Scams

While you're busy gathering your paperwork for tax season, cybercriminals are devising schemes to steal your identity and money. Know how to protect yourself and your loved ones.

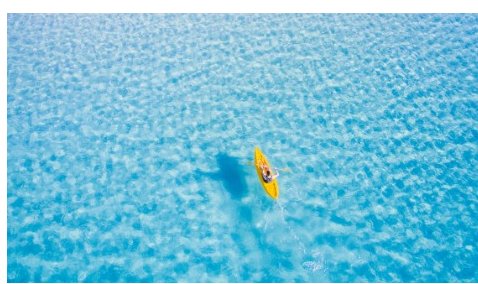
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### 6 Steps to Financial Literacy

April is Financial Literacy Month—an opportunity to build stronger money habits. Take control of your financial future with this personal finance checklist, whether you're just starting out or preparing for retirement.

[Learn More](#)



### How Affluent Families Can Plan for Hidden Risks

Hidden risks abound. For affluent families, this can mean unwanted financial exposure. A simple risk assessment can go a long way to help close these gaps.

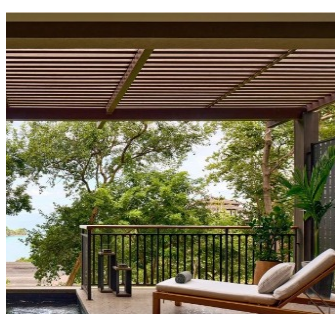
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## April Highlights



### 50 Defining Moments in the History of the First Major Golf Tournament

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### 11 Last-Minute Spring Getaways You Can Still Book

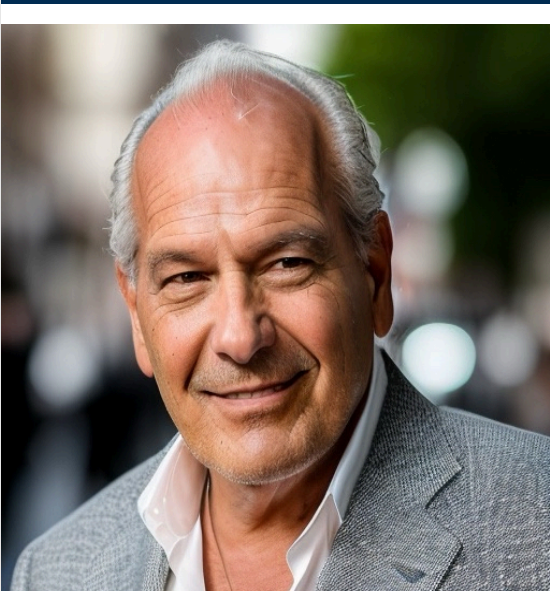
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### Ninth Annual Swiss Watcher

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## From My Team:



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Thank you for reading our April 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.

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