

August Newsletter

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I trust you have had a wonderful summer. As the summer begins to wind down, I wanted to share a few articles to help you prepare for the upcoming season. The August edition of my newsletter includes information on educational planning strategies, market insights, and a historical look at the United States' economy. Please share this newsletter with anyone you believe may benefit. As always, if you need anything, please reach out.

529 Plans: A Powerful Tool to Save for Education



With education costs rising, paying for college has become a major life expense that requires smart planning. Find answers to key questions here.

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Watch Out for a Fed Pause

Markets are pricing at least one 2026 rate hike, but Morgan Stanley Research expects the Fed to stay on hold as inflation moderates, supporting Treasuries and high-quality fixed income.



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Market Insights



What This Choppy Market Is Telling Investors

After a sharp rebound, high earnings expectations and fast rotations in Big Tech are keeping the market churning sideways. How should you invest?

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3 Things That Could Break the Summer Rally

Our Global Head of Fixed Income Research Andrew Sheets outlines what could potentially go wrong and disrupt markets' optimism this summer.

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America's Frontier-Market Origin Story

As America passes its 250th birthday, our Global Head of Fixed Income Andrew Sheets looks back at the early republic as a volatile frontier market, and what its path from credit risks to durable institutions can teach investors today.

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4 Tax-Smart Steps to Help Build Wealth

Learn more about how tax planning may impact your larger financial picture.



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