

January Newsletter



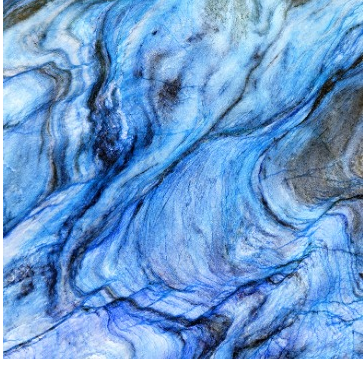
Below is the January edition of my newsletter. Please take some time to review and let me know if you would like to connect and discuss any of these items.



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 can get you started.

Learn More



What’s Driving U.S. Growth in 2026?

Our Chief U.S. Economist Michael Gapen breaks down how growth, inflation and the AI revolution could play out in 2026.

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Wealth Education for the Next Generation: Money Mindset Reset: The Power of Financial Planning

Monday, January 12, 2026  
4:00 p.m. – 5:00 p.m. ET

In this session, our clients will learn how a thoughtful financial plan can help set clear priorities, make informed decisions, and achieve both short-term and long-term goals. Led by Anthea Tjuankis Cox, Head of Financial Planning, participants will gain insights into identifying spending patterns, defining financial priorities, and applying practical strategies for managing income, expenses, and savings. Whether managing significant wealth or building a financial foundation, clients will leave empowered with actionable tools to approach the year ahead with clarity and confidence.

Register Here



2026 Tax Tables

To prepare for the 2026 tax season, it's important to familiarize yourself with the most current tax tables. Access the tables below.

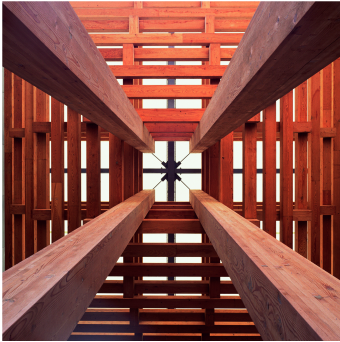
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Is the Crypto Bull Market Ending?

The four “seasons” of crypto’s historical trading cycle may hold insights as to whether it’s time to harvest the gains of crypto holdings.

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AI’s Impact on Software, Networks and Marketing in Europe

Companies are racing to deliver AI-driven returns, cost savings and productivity gains while preparing for disruption that will create new winners and upend legacy models. Get the latest from Morgan Stanley’s European Technology, Media & Telecom Conference.

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Patrick D Malzone  
Financial Advisor at Morgan Stanley

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2000 Westchester Avenue, Purchase, NY 10577-2530 USA

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