Morgan Stanley

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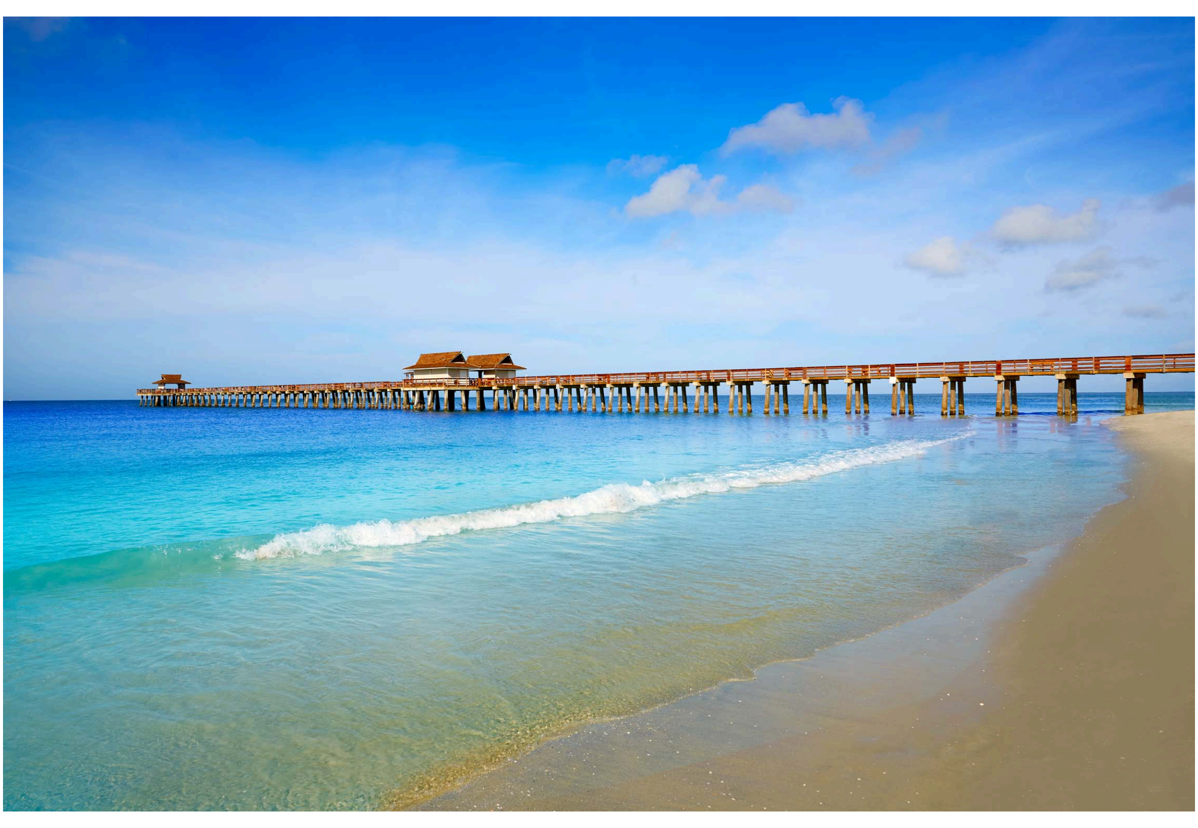
at Morgan Stanley

July Newsletter

I am excited to share the July edition of our newsletter. This issue is filled with valuable insights to help you navigate the year ahead. Please feel free to share it with anyone who may benefit, and reach out if you'd like to discuss any topics in more detail.

Summer is Here



Finally, the warm weather is here. As we reach the mid-way point of the year, now is the time to reflect on the past few months and look ahead to prepare for the future. The turbulence of spring saw major fluctuations in the market. Thus, suggesting that 'timing the market' can be risky, and often not worth it. Since then, we've seen an upswing.

I'm no stranger to market changes. I began my career in 1987, earning my licenses the week of the historic market crash. This event shaped my approach to financial advising. Being disciplined and resilient is second nature.

Now is the time to reach out with questions or concerns about the future. The landscape is every changing, but that doesn't mean you need to be reactive. Keep in mind that steadiness and a proactive approach can help you on your journey to growing your wealth.

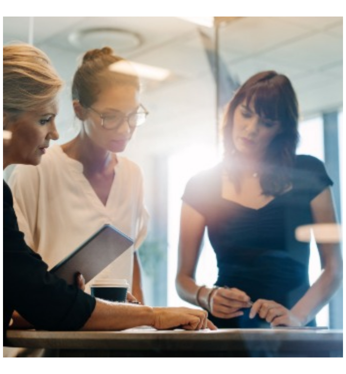
As the summer begins, please enjoy time with your family, friends, and loved ones. Relax and spend time in the sun.

Happy Fourth of July!

This month we celebrate the birth of our nation. Let's take a moment to reflect on the sacrifices made by our founding fathers and all those who have fought to protect our independence.

Whether you're grilling with family, watching fireworks, or just enjoying a day off, I hope you have a safe and happy Fourth of July!

Investor Resources



Tech Startups Tackle the Gap in Women's Healthcare

Women face inequities in healthcare that make them less likely to seek care, pay more for it when they do and have poor experiences. See how these startups are combatting these issues.

Learn More

Technology That Could Define the Decade

Innovation driven by necessity may spark significant breakthroughs by 2030 in areas such as self-driving cars, humanoid robots and AI-assisted fertility.

Learn More

How Retirement Plans Influence Healthcare Acquisitions

The healthcare industry is experiencing a wave of consolidation activity, particularly among large hospital systems that are looking to manage rising costs and expand their reach across markets and throughout the continuum of care.

Learn More

Financial Wellbeing

Financial Planning for Life After Selling a Business

Selling your business can mean big changes for your life, both personally and financially. Know how to make the most of your windfall.

Learn More

4 Tax-Smart Ways to Diversify Your Portfolio

Investment portfolios concentrated in a single stock can be risky. Learn tax-smart ways to diversify.

Learn More

Connect with Me

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