

October Newsletter



My family and I visited Mackinac Island for the first time last month. It was the perfect way to start the fall season. Beautiful weather and views.

Please reach out if you have any questions or would like to discuss any of the content below.

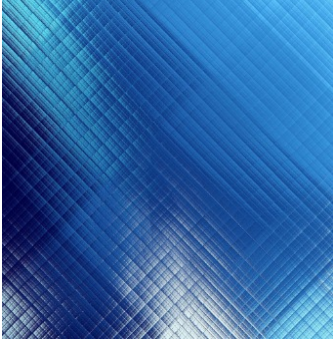
Investor Resources



Fall Planning for Your Finances

Learn the money moves you can make this fall to set yourself up for success in 2026 and beyond.

Learn More



Equity Compensation

Equity compensation can create concentrated risk in portfolios. Here's a way to manage it:

Learn More



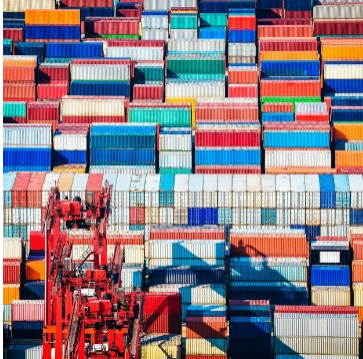
Medicare Open Enrollment Begins October 15th

Turning 65 is a significant milestone, bringing new healthcare considerations as you become eligible for Medicare.

Medicare Website

Financial Wellbeing

Wealth Education for the Next Generation virtual event on Monday, October 6th



Protecting your personal information online is more important than ever. Join our next Wealth Education for the Next Generation virtual event discover essential cybersecurity practices and develop responsible social media habits that will help safeguard your digital presence in today's interconnected world.

Register Here

Connect with Me

Website



Patrick D Malzone

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